

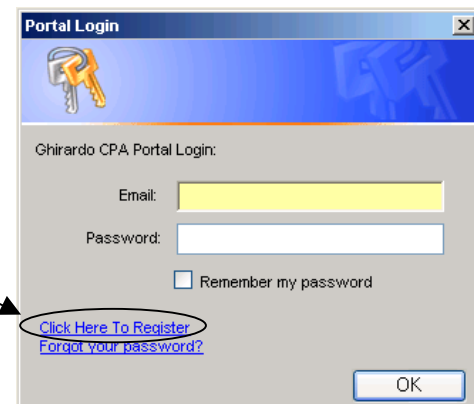
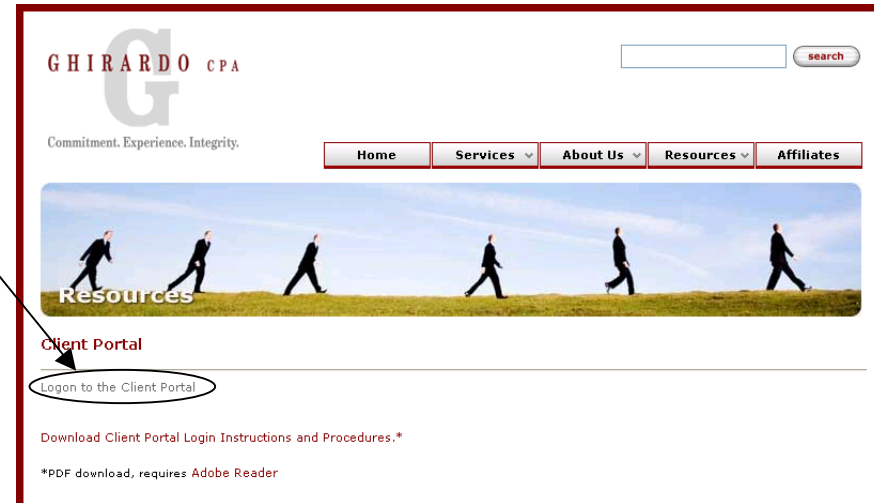


Ghirardo CPA Client Portal

Client Login and Upload Procedures

Step 1: The Initial Login Screen

- Click the **Log on to Client Portal** link
- A new window will appear
- The first time you visit the **Client Portal**, you will need to register
- To register, click on the **Click Here to Register** link



Step 2: Registration Page

- Fill out all fields and enter the 4-digit code
- 4-digit code is for additional security and keeps spammers from getting in
- Click Register when all fields have been filled out

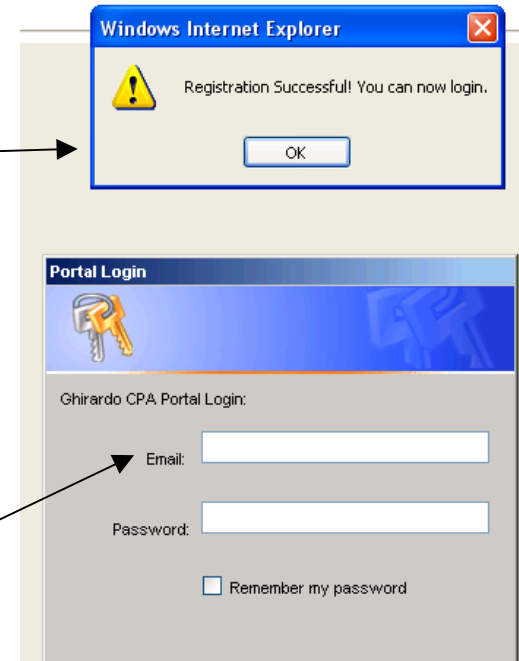
The screenshot shows a web form titled "New Client Registration" for "Ghirardo CPA Registration". The form contains the following fields:

- First Name: Joe
- Last Name: Client
- Company (optional): ABC Corp
- Email Address: joe.client@abccorp.com
- *Portal Username: joe.client@abccorp.com
- Portal Password: [masked]
- Confirm Password: [masked]

Below the password fields, there is a note: "* Automatically set to match email". At the bottom of the form, there is a field labeled "Enter 4-Digit Code:" with the value "AXHS" entered. To the right of this field is a "Cancel" button and a "Register" button, which is circled in red. Arrows from the text on the left point to the "AXHS" field and the "Register" button.

Step 3: Login

- If all information has been entered correctly, you will see the **Successful Registration** window
- Click OK
- You will be notified by email when the account is fully activated*
- Login using the email address and password you provided on the registration form



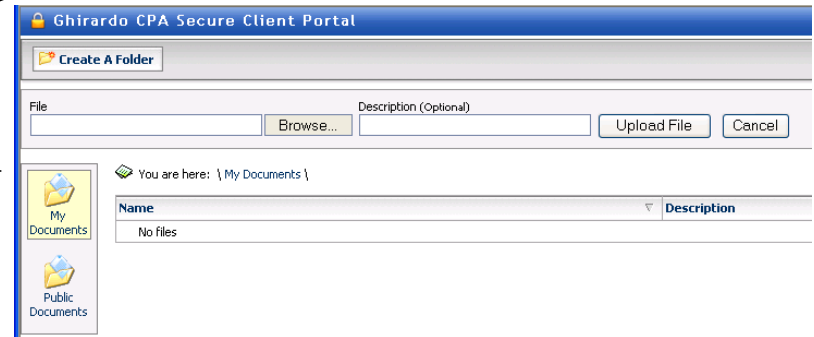
*If you are unable to access Document Management within 24 hours of registering, please contact us at: client-portal@ghirardocpa.com or 415-897-5678.

Step 3: Login, continued

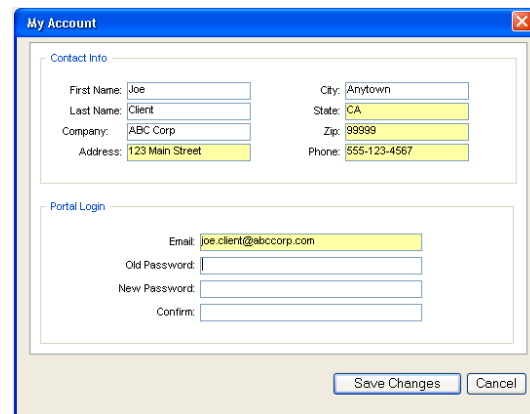
- A new window will appear. From here click on either the **Secure File Vault** icon or the **My Account** icon.



- The **Secure File Vault** icon will take you to your document manager.

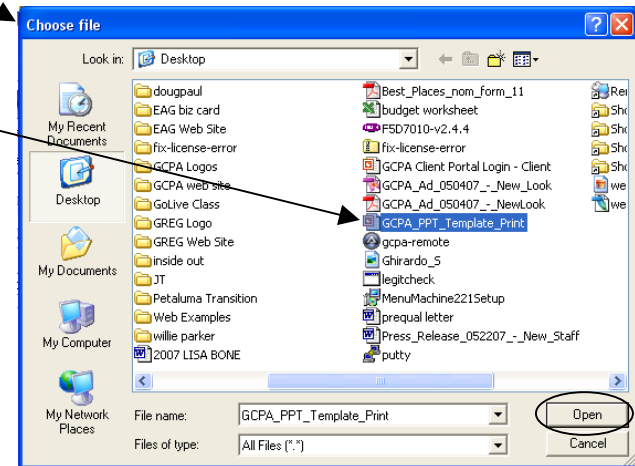
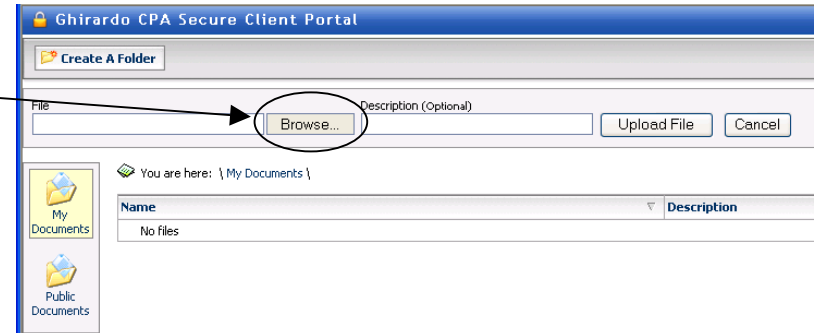


- The **My Account** icon goes to your account profile page.



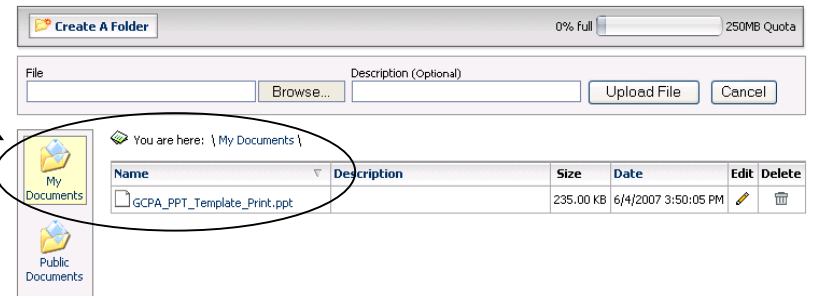
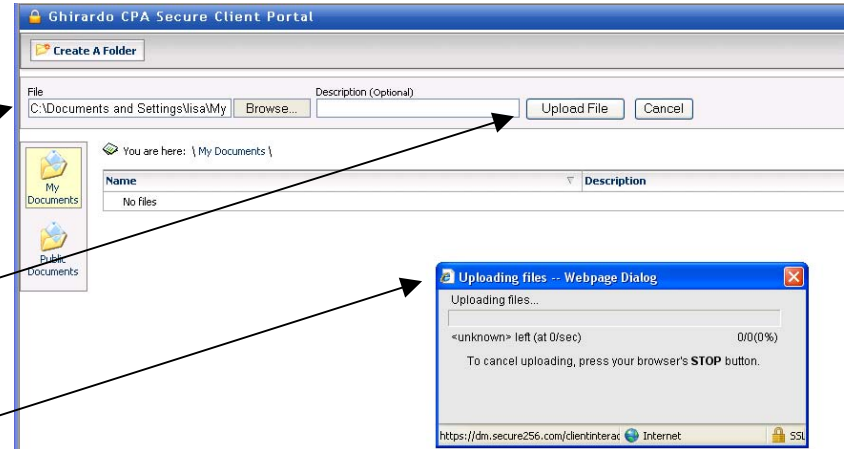
Step 4: Upload Files

- To upload your file, click the **Browse** button
- A **Choose File** window will open – once the file you wish to upload is **highlighted**, click **Open**



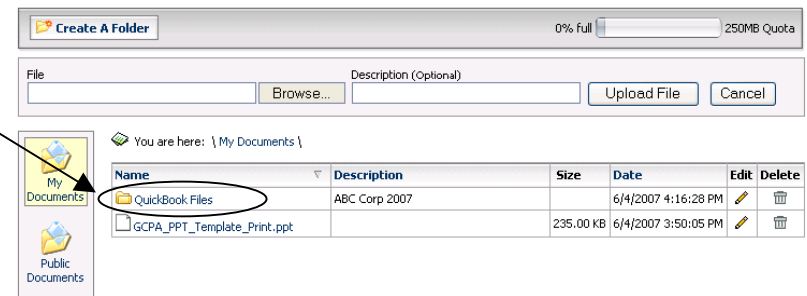
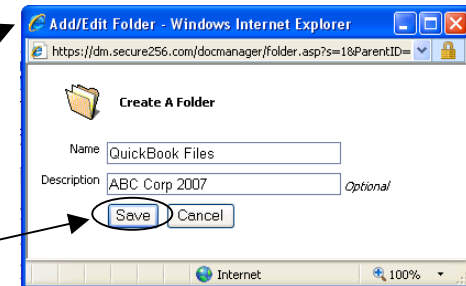
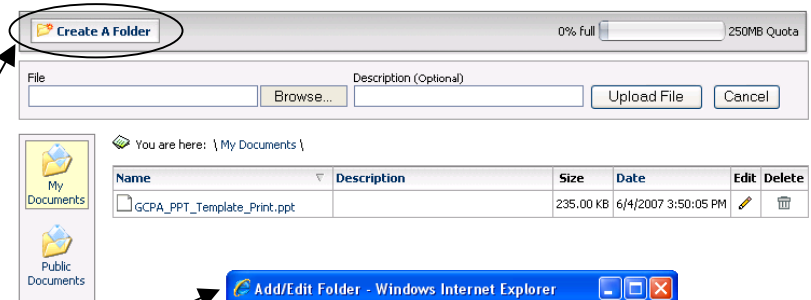
Step 4: Upload Files – cont.

- The file to upload is now visible in the Browse window
- To finish the process, click the Upload File button
- An Uploading Files status box will appear
- The file now appears in the My Documents folder



Step 5: Create a Folder – Optional

- If you would like to organize your files in separate folders, you can Create a Folder within your My Documents folder
- Click the **Create a Folder** button
- An **Add/Edit Folder** window will appear
- Name your folder and click **Save**
- Your new **folder** is now available
- Click on the folder and follow the previous upload instructions



Step 6: Log Out of Client Portal

- To Log Out of the Client Portal, click on the **Log Out** button

