PBMares, LLP
and
iChannel
Client Portal Guide

Portal User Guide for Clients

Welcome to the PBMares Secure Client Portal. The Portal is a feature of a larger Document Management System, called iChannel, which has been implemented by our firm. This portal offers a secure location for you to access your data and upload documents of your own. Via the internet, you now have access to your data 24 hours a day, 7 days a week. No more waiting for copies and revisions to be mailed back and forth. Just imagine the time and money that can be saved!

This guide will walk you through logging into your personalized, secure portal site. It will also show you how to access your documents, how to upload your own documents, and how to reset your password.

Logging into the Portal

You will be provided with the following information needed to login to your Portal. Record that information here:

Website:	https://iportal.pbmares.com
User Id:	As provided in your introductory email
Password:	Initially provided in your introductory email, but required to change upon first login

1. Go to the provided website. You will see a login screen.
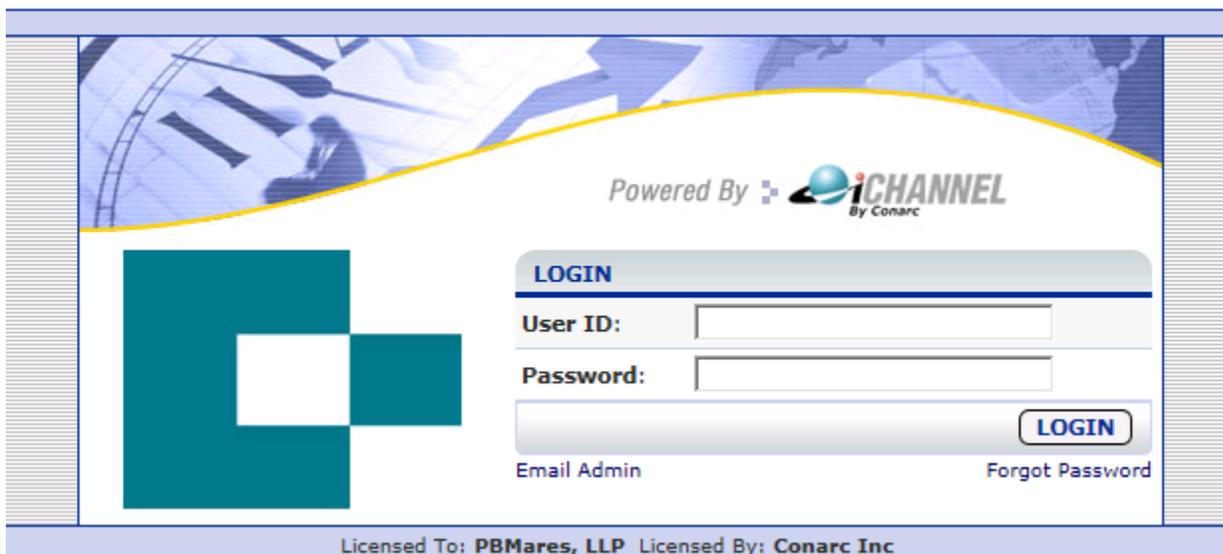
2. Enter the user id and password. (If you have forgotten your password, click the Forgot Password link under the Login button. If you need support, click the Email Admin link.)
3. Click the **Login** button.

4. You will see the Terms and Conditions screen the first time you login.
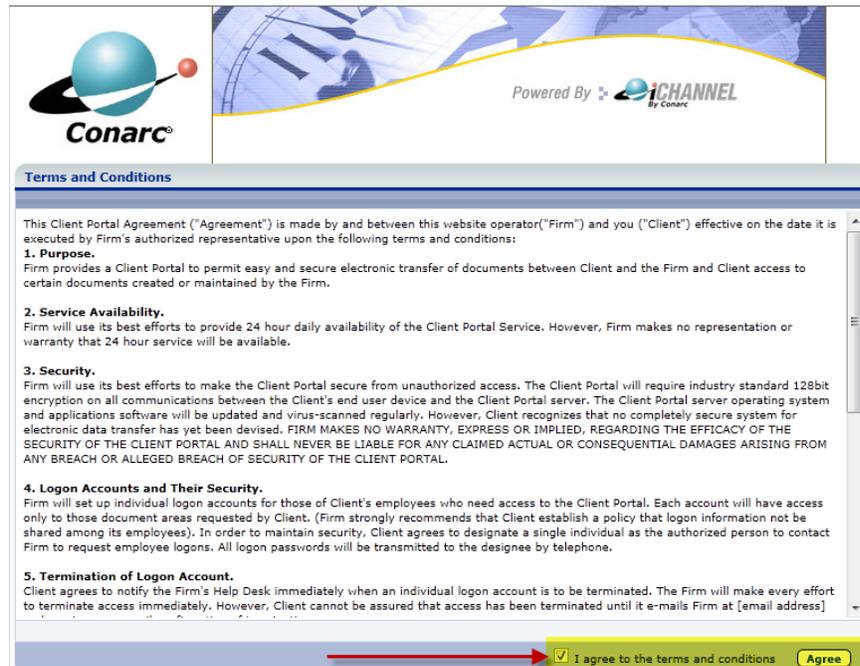
5. Check the box to agree to the terms and click the **Agree** button.

6. You may be prompted to change your password and set-up the **Forgot Password Questions**. Make any changes and click the **Save** button. The screen will refresh.
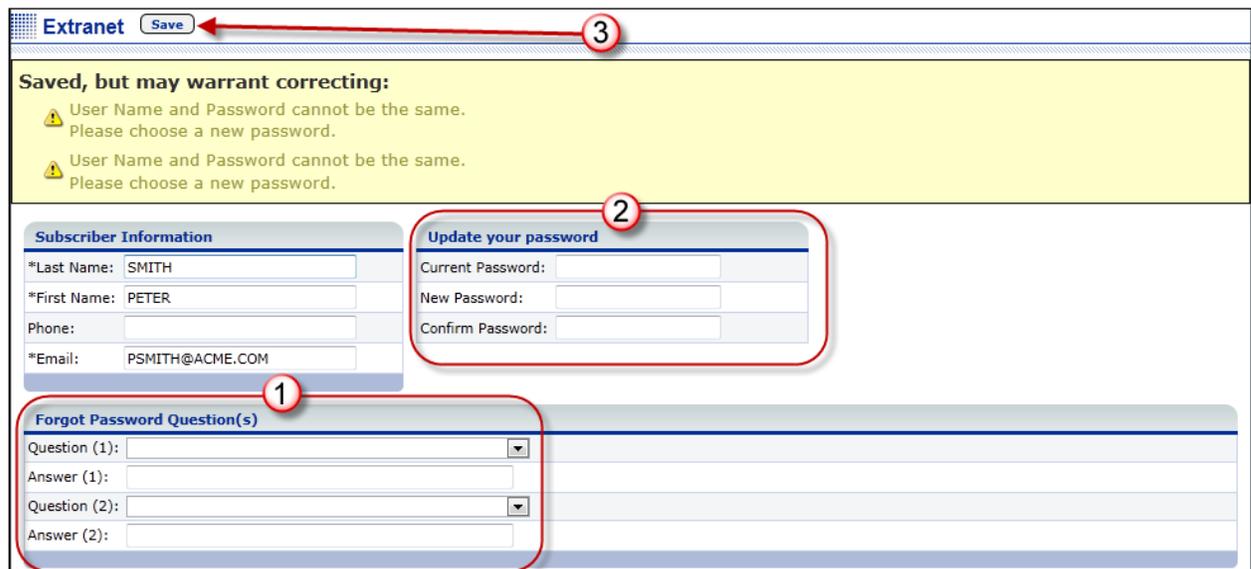
7. Click the **Files** link at the top of the page.

Accessing Documents Provided by PBMares

Begin by clicking the **Files** link at the top of the page to view the document menu.

The menu is organized by headers (Executive, Administrative, Accounting, Staff) and topics (Documents). Security controls which headers you will see; therefore you may only see Accounting for instance. The circled number to the right of the Documents topic indicates the number of files your accountant has made available to you. Click on the word *Documents* in the left menu and the files will appear to the right in the Files List.
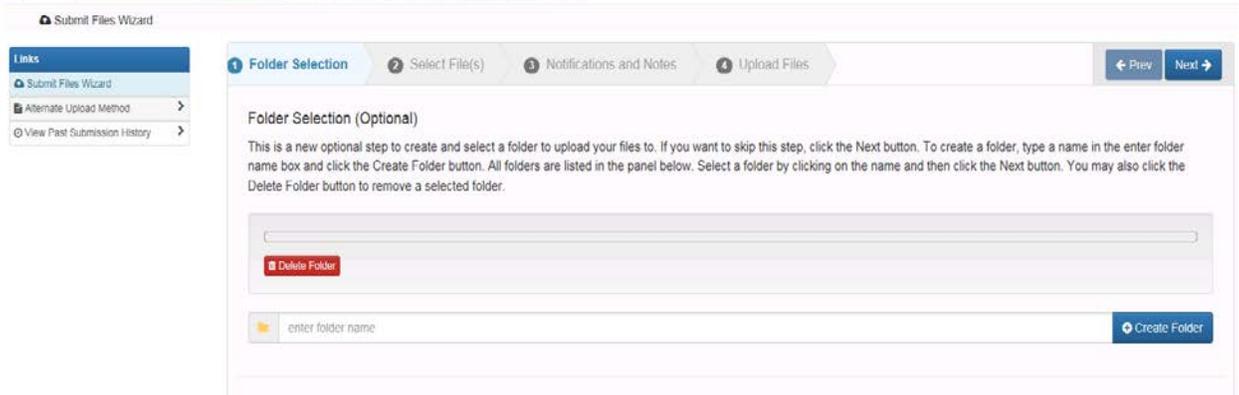

Clicking the document name will prompt you to Open, Save or Cancel.
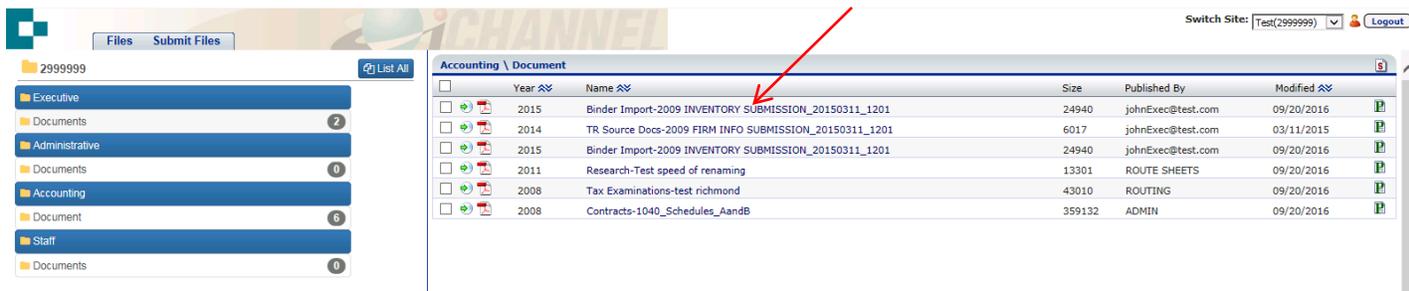
Uploading Documents to PBMares

There are two ways to add documents:

1. **Submit Files** – this option invokes a wizard to walk you through the steps of uploading multiple files simultaneously.
   a. Click the Submit Files tab and follow the onscreen instructions

b. As the instructions indicate, the *Folder Selection* step is optional. Creating a folder will group the files you upload. If you create a folder, make sure to click on the folder name (you'll see it above the red Delete Folder button) to select it in order to upload the files to that folder. You may create multiple folders, but you cannot create a folder within a folder (no subfolders). It is not required to create a folder and you may click the blue Next button to move to the Select Files step.

c. At the *Select Files* step, either
   i. From your computer, open a folder, click and drag the file to the gray area showing "Drag files here". Hold down the Ctrl key while clicking files to select multiple files to drag.
   ii. OR you may click the blue Select Files button to browse for files on your computer. When browsing, click on the file you wish to upload or select multiple files by holding down the Ctrl key while clicking the files. Click the Open button after selecting the files then click the blue Next button to proceed to the next step.

d. The *Notifications and Notes* step is optional as well.
   i. If there is a specific PBMares employee you want notified of your document upload, begin typing their name in the Email Notification field and select their name\email address from the resulting drop down list.
   ii. If you would like to include a note regarding the files you're uploading, type the information in the Notes field (an email address in the field above is not required if you only want to add a note).
   iii. Click the blue Next button to proceed to the final step

e. At the *Upload Files* step, review the information and if correct click the blue Upload button. If incorrect, you may click on any of the previous steps to make modifications.

f. Upon clicking the Upload button, you will see various status notifications as shown below. You will also see a percentage bar at the bottom of the window which will show 100% when you see the green Upload Complete bubble.
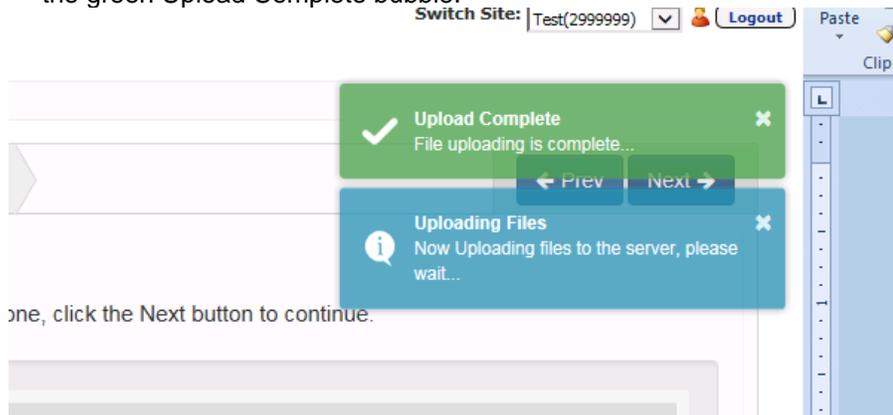
g. Click the Files tab to return to the document listing or Submit Files tab to upload additional files.

h. Uploaded files are not available for viewing on the portal, but you can review the *Submitted Files History* link in the Submit Files window to see a listing.

2. **Alternate Upload Method** -
   a. Click the Submit Files tab
   b. Select *Alternate Upload Method*
   c. The following window will appear allowing you to select up to five files to upload
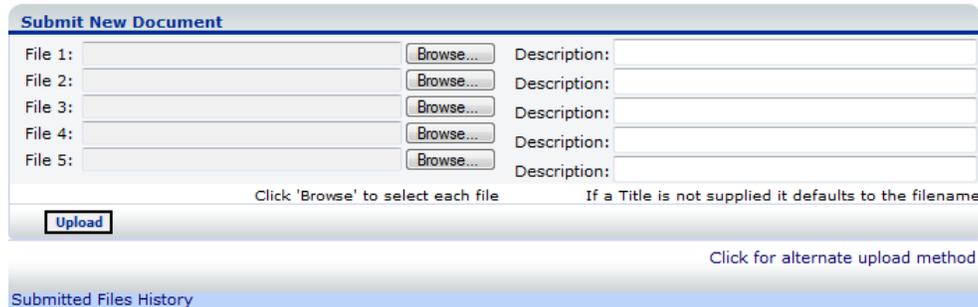
   i. Click the Browse button to find the file from a disk, computer, network, CD, etc.
   ii. Supply a title or if no title is listed the existing file name will be used.
   iii. Click **Upload** to add the file. All documents you upload will be listed by clicking the link *Submitted Files History*.

Changing Your Password

Once you log in to your portal you may want to change your password.

1. Click the My Profile icon at the top right of the screen. Locate the Password area.
2. Enter your current password.
3. Enter your new password.
4. Re-enter your new password.
5. Click Save at the top left of the screen. You will receive confirmation in red when the password is changed.
6. Click the logout link at the upper right corner of the screen and then login again with the new password.

Changing Your Forgot Password Questions

1. Click the My Profile icon at the top of the screen. Locate the Forgot Password Questions area.
2. Select a question from the drop down menu.
3. Enter your answer in the Answer field.
4. Click Save a the top left of the screen.

Switching Between Sites

If you have been provided access to multiple client sites, you may switch between them without the need for multiple logins. To switch between sites:

1. Click the arrow in the dropdown box next to Switch Sites

2. A list of clients to which you have access will appear
3. Select the name to switch to that client portal
4. Click on the topic "Documents" in the menu at the left to view the available documents
5. Or click the Submit Files tab to upload files for that particular client