GRAY CPA INC.

Secure Portal Tips

---

https://graycpainc.firmportal.com. This website will take you to our secure client portal where you can easily upload (send to us) and download (receive from us) sensitive documents and files.

If you **have not** used the portal and would like an invite for your user name and password, please contact Darlene Drumm, our office manager at 440.333.0555 or ddrumm@rhgraycpa.com. If you **have** used the portal and have simply forgotten your password, you will need to click the "forgot password?" link at the website and you will get a reset email very quickly. We do not know your password, nor can we reset it for you.

Tips:

- Please upload all documents in one scan (if possible), they need not be in any particular order.

- If you need to remit single/supplemental documents or files throughout the year, that is fine also.

- Please refrain from sending pictures (if possible), those jpgs are typically blurry and hard to incorporate electronically.

- If you have multiple files on your PC that you are ready to upload, please compress them in a .zip file. This makes the file smaller for a faster upload, allows you to upload one file, and allows the Gray CPA team to simply download one file. (Rather than one by one).

  -To zip (compress) a folder:

  1. Put all the files you want to zip in the same location, like the same folder.

2. Select all the files. An easy way to do this is to drag a selection box around them with the mouse pointer, or hold down Ctrl as you click each one.

3. Right-click one of the selected files.

4. In the drop-down menu, choose Send to and then click Compressed (zipped) folder.

5. A new zip file will appear in the same folder. You can identify a zip file visually because the icon has a zipper on it.

6. You can always rename it if you want to by right clicking and selecting "Rename" which will allow you to type in a new name.

Visuals:

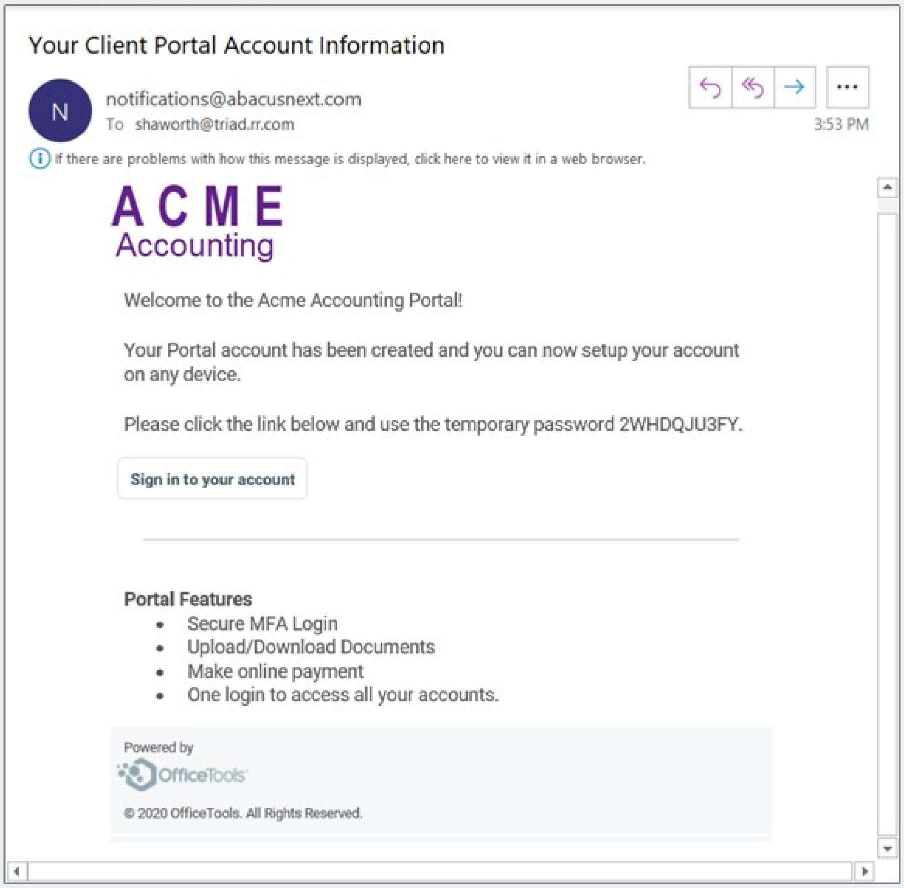
Overview of Firm Portal

The firm portal is a safe and secure way to share documents and access invoices. Invoices can even be paid through the portal using Abacus Payment Exchange (APX).

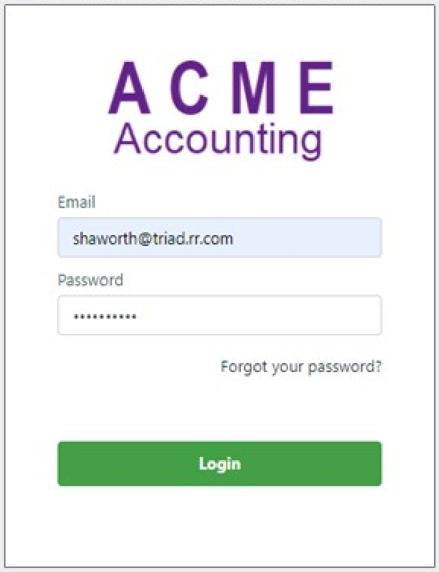
Use this guide to help you use the firm portal.

First Time Sign In

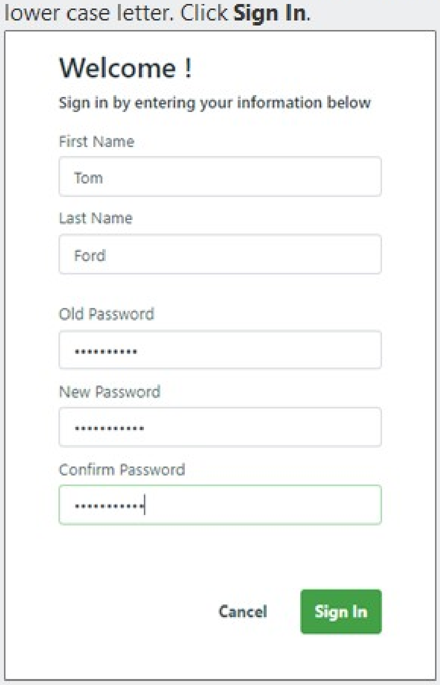
1. When you are granted access to the firm portal, a welcome email is sent to you. Open the email and click **Sign in to your account**.



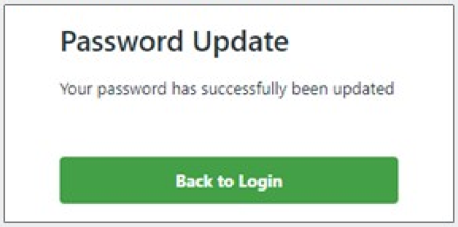
2. The **Sign In** page opens in your web browser. Enter your email address and the temporary password from the welcome email. Click **Login**.



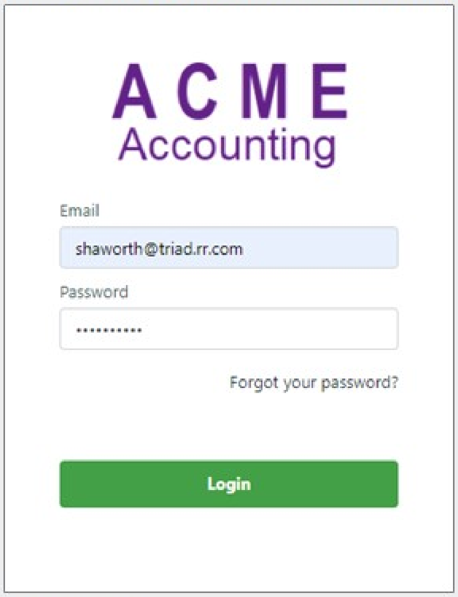
3. Complete the welcome form. When creating your new firm portal password, note that the password must be at least 8 characters long and contain at least one number, one uppercase letter, and one lower case letter. Click **Sign In**.



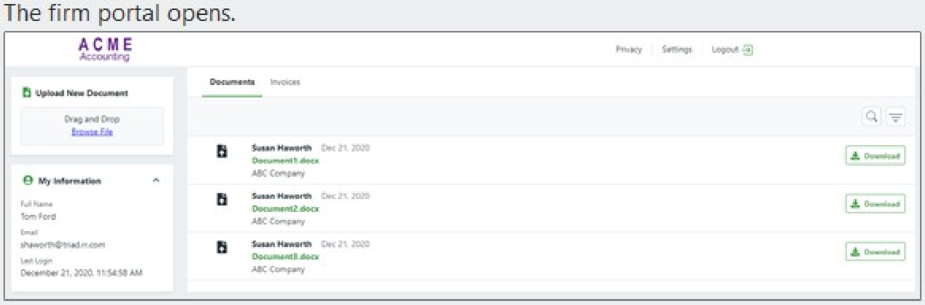
4. Notification that your password has been changed appears. Click **Back to Login**.



5. The **Sign In** page reappears. This time (and for any future sign in) enter your email address and the new password you just created and click **Login**.



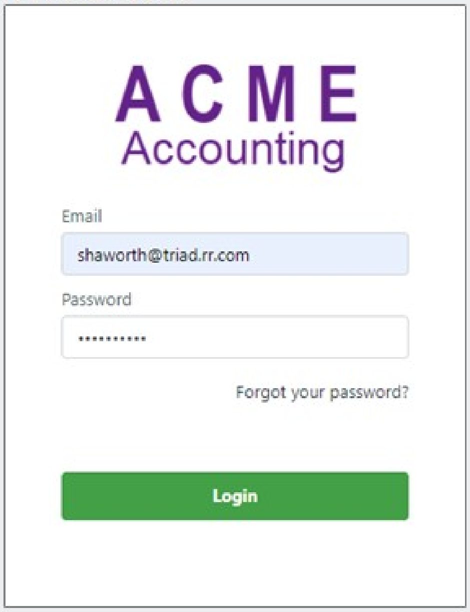
6. The firm portal opens.



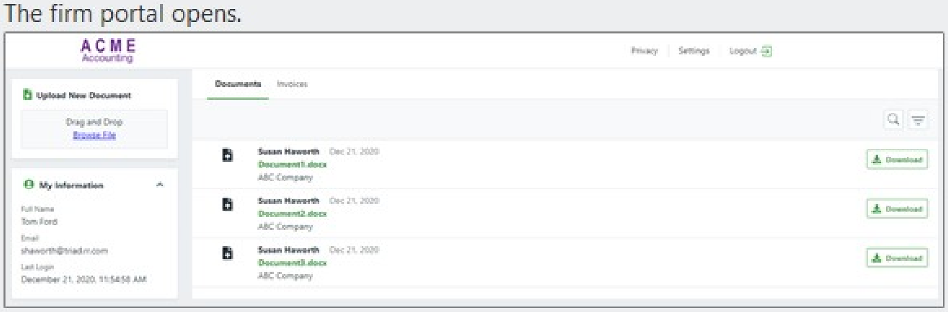
Signing In

Signing In without Multi-Factor Authentication

From the sign in page (which appears when you are not signed in), enter your email address and pass
and select **Login**.



The firm portal opens.

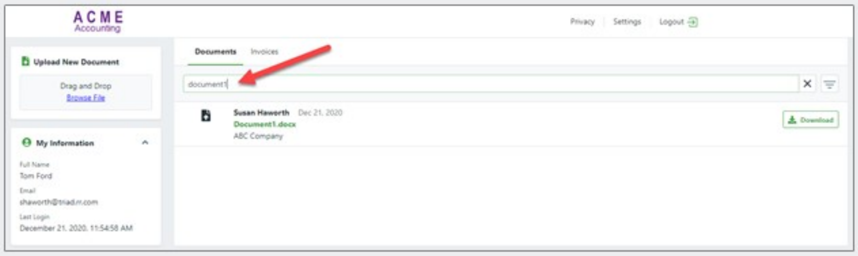


Working with Documents

The firm portal displays a list of documents for your account.

Searching for Documents

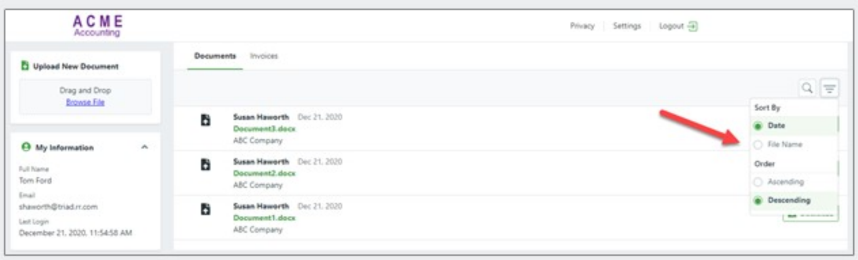
Select the search button and enter the document name (or a portion of the document name) in the box. Documents matching the search string are listed.



Click **X** to clear the search.

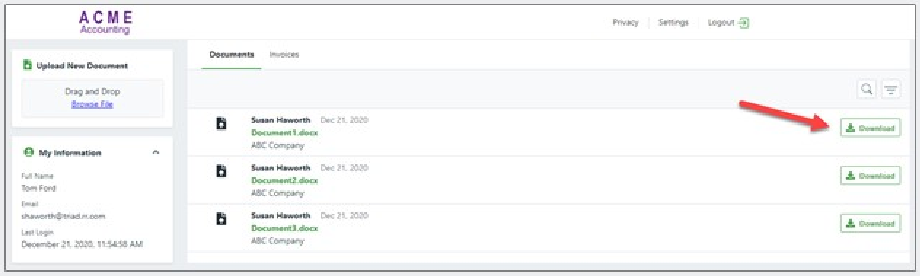
Filtering the Document List

Select the filter button . The filter menu appears. Select how you want to sort and order the document list.



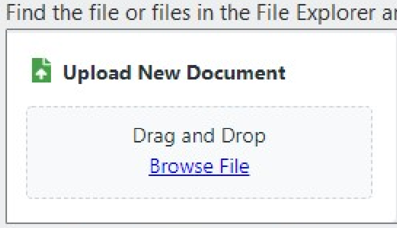
Downloading Documents

Find the document in the list and click **Download**.

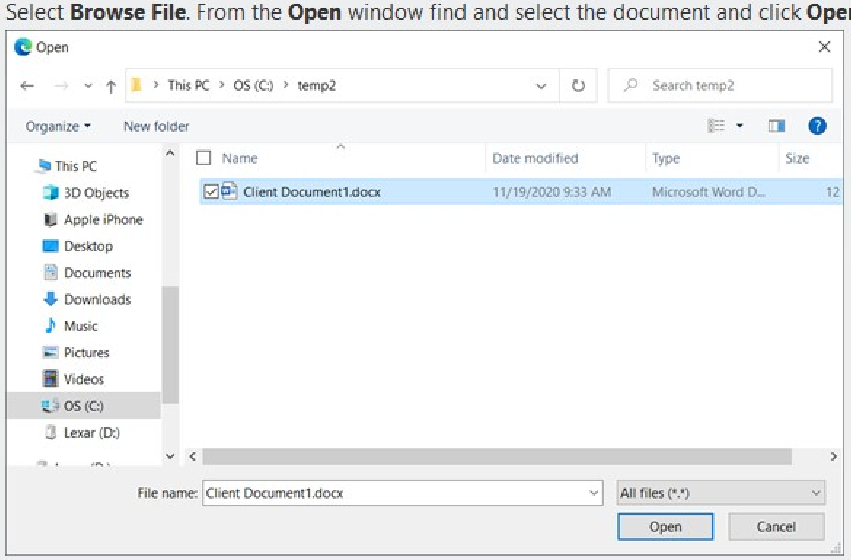


Uploading Documents

1. In the **Uploading Documents** pane on the main window, do one of the following:
   - Find the file or files in the File Explorer and drag and drop them onto the pane.

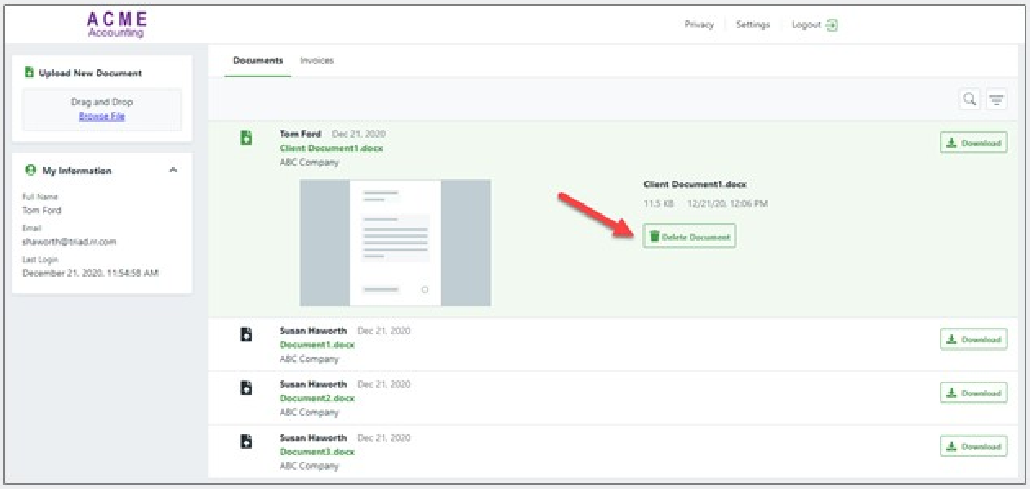


   - Select **Browse File**. From the **Open** window find and select the document and click **Open**.

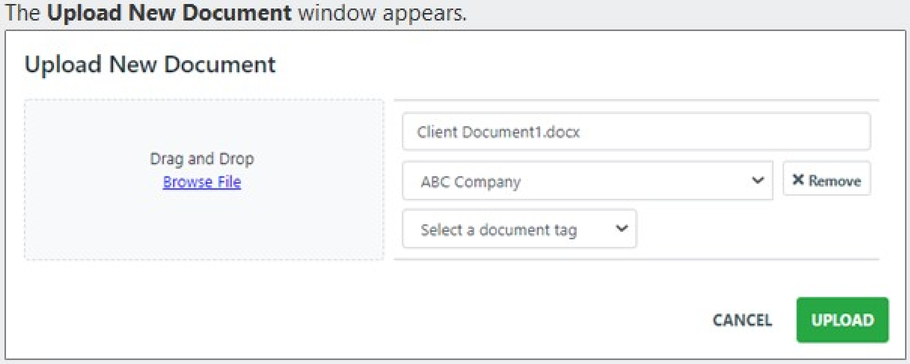


Deleting Documents

Select the document name, then select **Delete Document**.

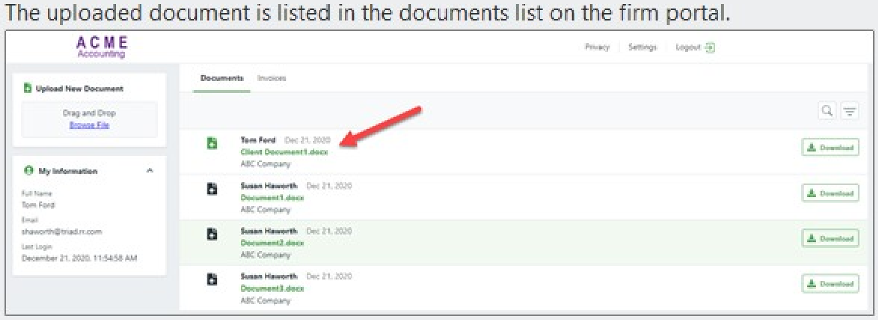


2. The **Upload New Document** window appears.



- Change the person or company as necessary.
- If document tagging has been enabled for the firm portal, select a document tag to categorize the document.
- Click **UPLOAD**.

3. The uploaded document is listed in the documents list on the firm portal.

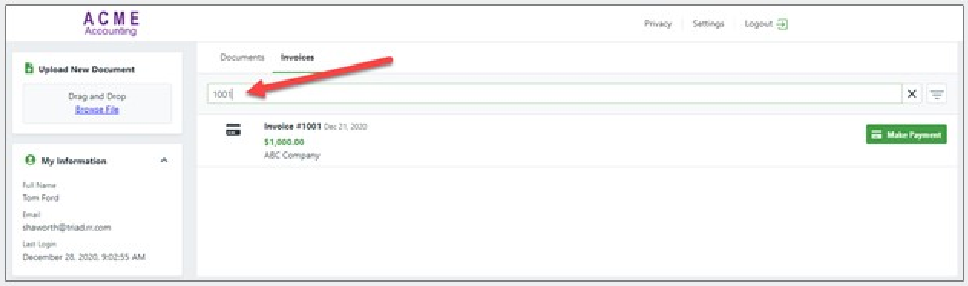


Working with Invoices

The **Invoices** tab on the firm portal displays a list of invoices for your account.

Searching for Invoices

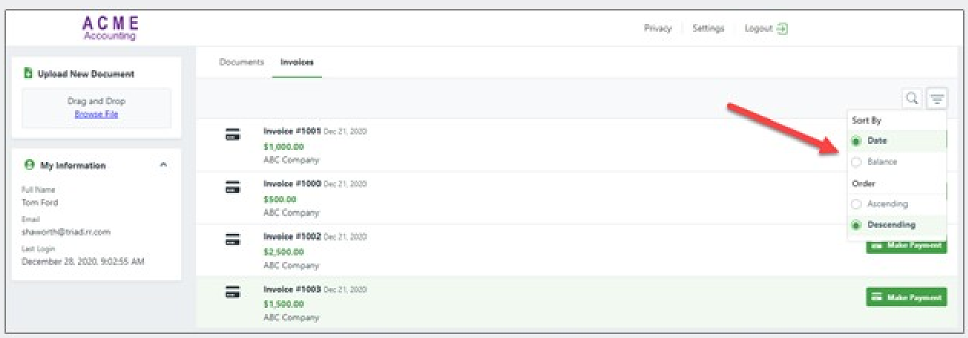
Select the search button and enter the invoice name (or a portion of the invoice name) in the box. Invoices matching the search string are listed.



Click **X** to clear the search.

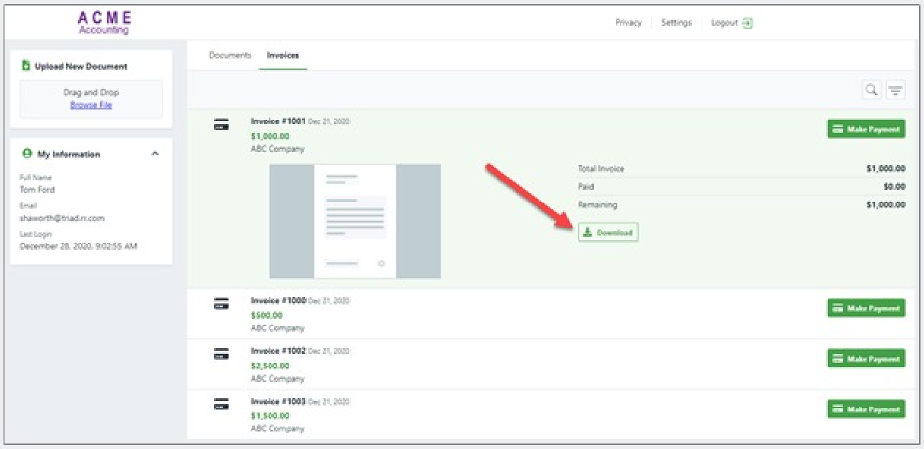
Filtering the Invoice List

Select the filter button . The filter menu appears. Select how you want to sort and order the invoice list.



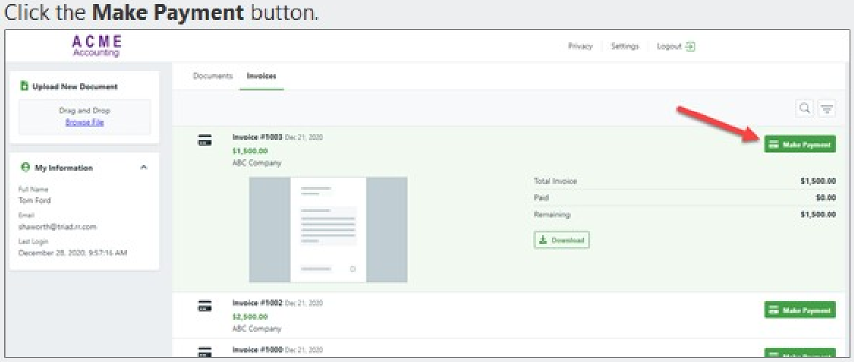
Downloading Invoices

Click the invoice number and click **Download**.

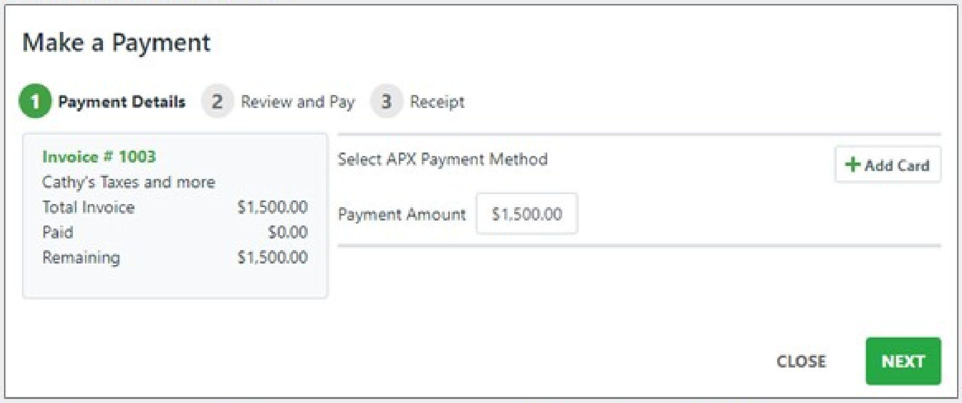


Paying Invoices

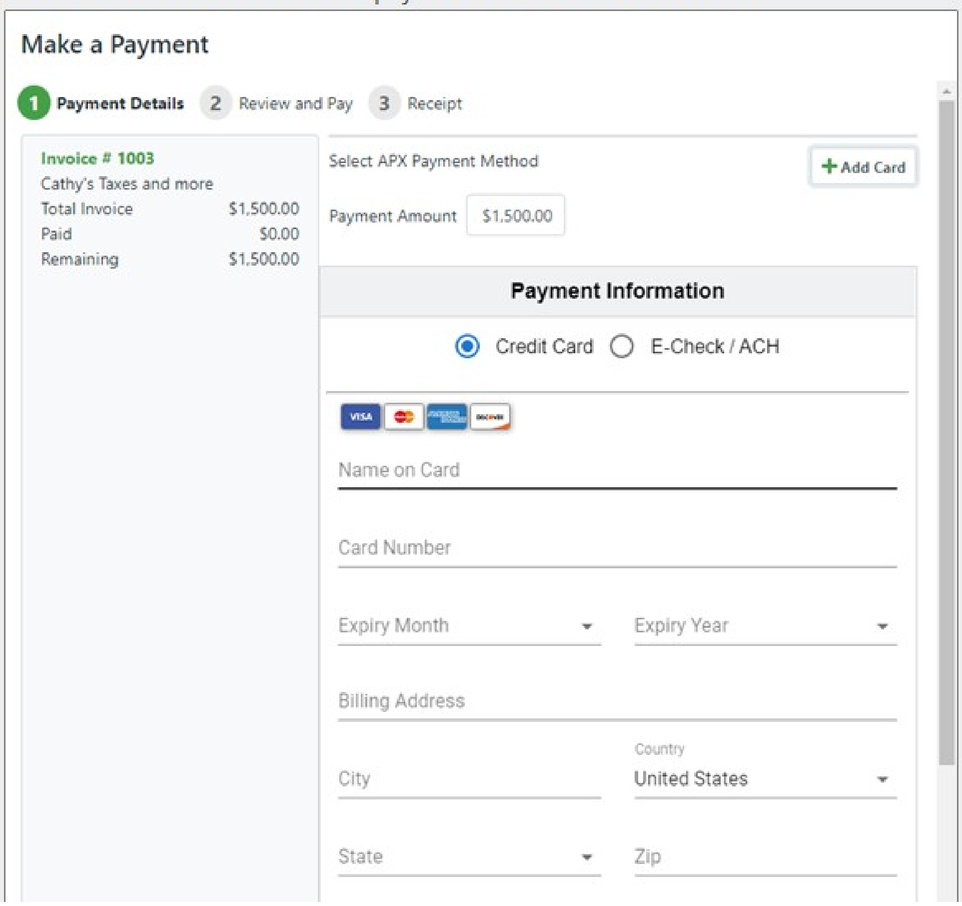
1. Click the **Make Payment** button.



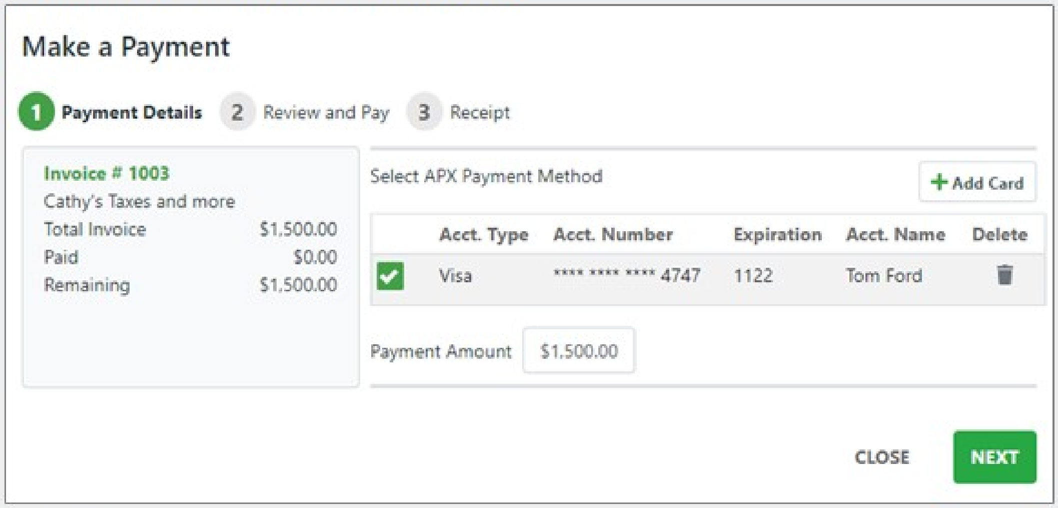
2. The **Make a Payment** window appears. If you see the payment method to use listed, go to step 4. Otherwise, click **Add Card**.



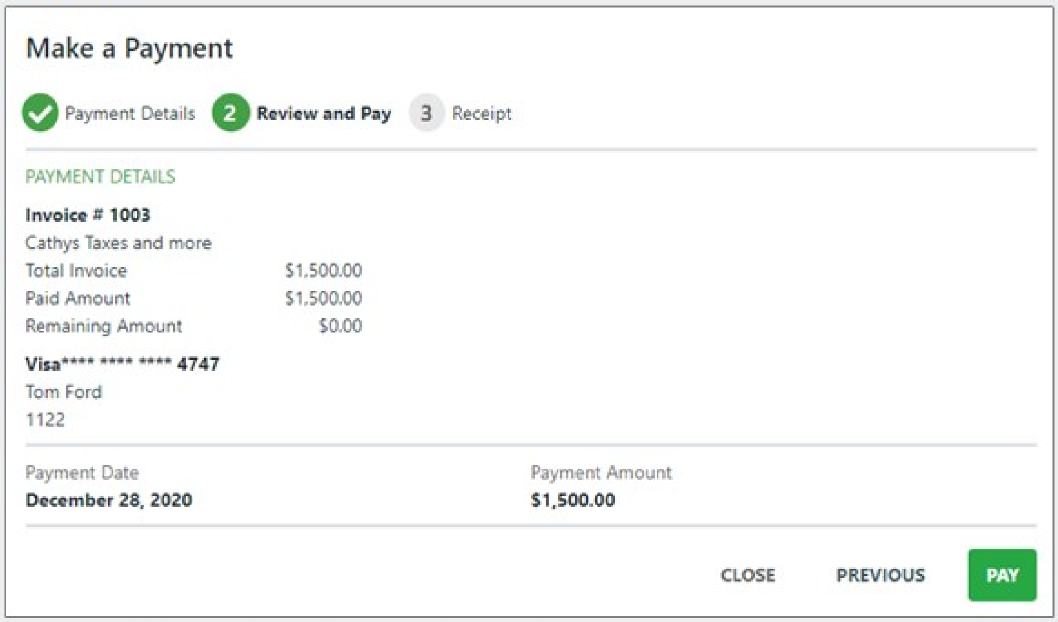
3. Enter the information for the new payment method and click **SUBMIT**.



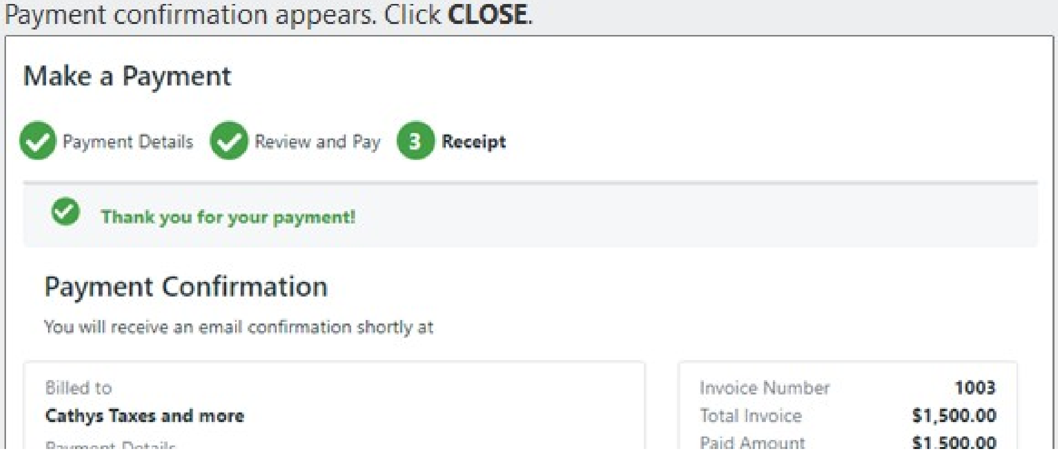
4. Check the payment method and click **NEXT**.



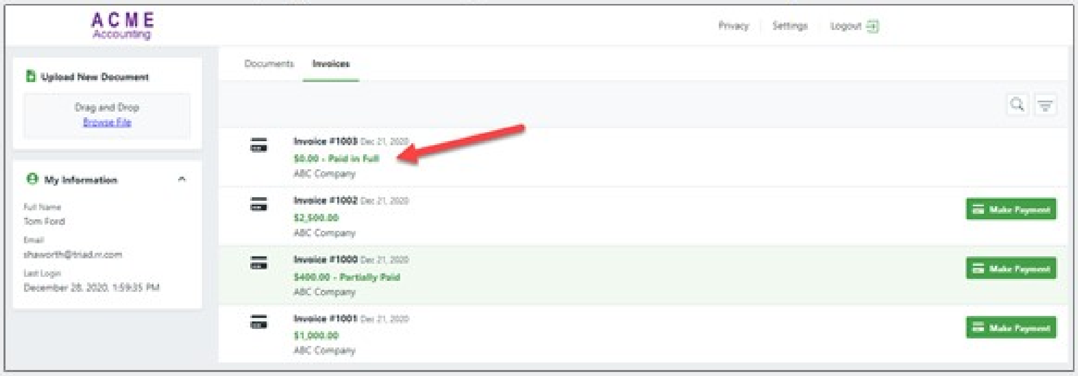
5. Click **PAY**.



6. Payment confirmation appears. Click **CLOSE**.



7. Notice that once the page is refreshed, the invoice is marked as paid.

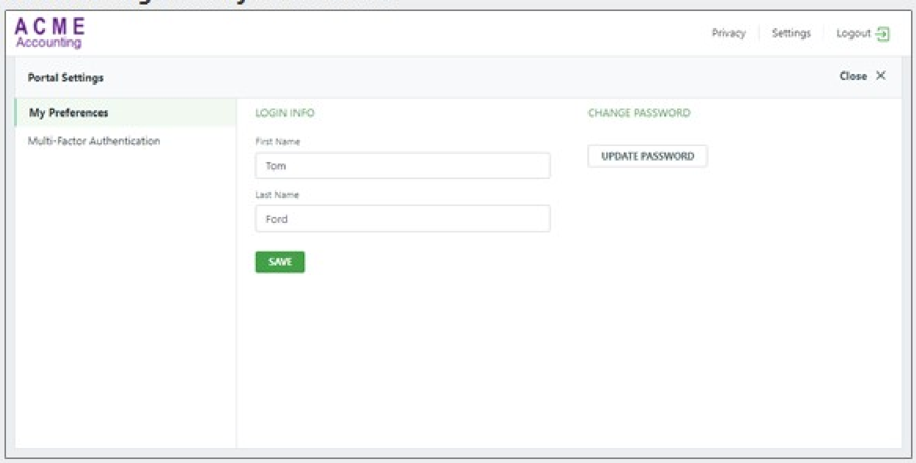


Signing Out

Select **Logout** in the upper right corner.

Account Information

1. Select **Settings** and **My Preferences**.



2. To change your contact information, change your first and last name as necessary and click **SAVE**.
3. To change your password, click **UPDATE PASSWORD**. Complete the form for the new password and click **Update**.