

How to access client portal if you did not receive a temporary password or if password is forgotten

Full Email address is the log in ID

Go to our portal page: <http://www.fgmk.com/client-portal>. Click on the **Green button**. Follow the log-in instructions on the screen to access your portal

IF YOU HAVE FORGOTTEN YOUR PASSWORD, OR HAVE NEVER RECEIVED AN INITIAL EMAIL TO SET UP YOUR PASSWORD:

Full Email address is the log in ID

Go to our portal page: <http://www.fgmk.com/client-portal> Click on **Green button**.

Click on forgot password, leaving the User ID and Password blank

On the next screen enter your email address and the characters in the blue box, click next, then request a new temporary password. Select your email address or cell number for the way you would like your temporary password to be sent.

Once you receive the temp password, enter it in the box indicated. You can copy from the email you receive, and CTRL V to paste the temporary password).

Answer the security questions and create a permanent password if you haven't already done that.

You may need to unblock pop-ups to view any files we publish to your portal.

FOR YOUR ACTION folder with the government copy is all your action items, including e-file forms that must be signed and returned to FGМК.

FOR YOUR RECORDS folder has a full copy of your returns for your records

Instructions to Add or Remove a portal user

Add New User

If you have more than 1 portal, select a portal from the list to the left of your page under **Select a portal**

Click on the portal you wish to access. Once there, click on **CLIENT USERS** at the top right of the page, just under your name and to the right of **FILES**. If you currently have more than one user on a portal, they will show up on the list here.

To add a user, click on the blue **Add New User** to the left of the page. Enter all required information, (*), then hit the blue **Save and Close** to the right of the page.

***Note: If you want a user to have access to more than 1 portal, you will need to follow the above steps in each portal.**

Delete a User

You have a couple of options when deleting users.

1. If you have more than 1 portal and the user has access to all or some of them, you can choose to remove access to the current portal only. To do this, simply uncheck the Grant Access box and check Yes. The user will disappear from the current portal but will still have access to other portals he/she currently has access to.
2. If you wish to completely delete a user from a portal, check the box to the left of the user's last name, then click on the box with the 3 dots next to the **Edit** box and click on the word **Delete**. Select Yes to confirm permanently deleting this user.
 - If the user you are trying to delete is currently logged in to the portal, a confirmation box will appear asking if you would like to continue with the deletion of the user(s)?
 - If the user you are trying to delete is a portal administrator on this or another portal you will not be able to delete this user. You will have to contact your accountant at FGMK directly to have the user deleted.

How to Restrict Folder Access

If you wish to restrict certain folders in a portal from users, follow the instructions below.

Click on **FILES** at the top right of the page. Check the box of the folder you wish to secure. You can only secure one folder at a time. Once done, click on the box with the 3 dots next to the blue **Upload** box and select **Secure Folder**. A list of users will appear. Uncheck those you wish to restrict access to and click on **Save and Close**.

If you wish to allow access to previously restricted folders, repeat the above steps, but click on **Remove Folder Security** and follow the above steps.

***Note: Only portal administrators may add, remove or edit users and restrict folder access.**