

Client Access Portal Guide



The FGMK Client Access Portal allows you to securely and confidentially exchange documents with our team. This guide provides step-by-step instructions for logging in, uploading files, managing users, and troubleshooting common issues.

GETTING STARTED

Your Welcome email will come from Wolters Kluwer at do-not-reply@wolterskluwer.com.

1. Log in to the portal.
2. Take “The Tour” in the Welcome window to review features and updates.
3. If the Welcome window does not appear, access it from the Portal Admin/User dropdown menu.

LOGGING IN

1. Visit: <https://fgmk.com/client-portal/>
2. Click the green Client Portal access button.
3. Enter your email address (User ID) and password.
4. Click Log In.
5. Complete two-step verification if prompted.

CLIENT PORTAL ACCESS >

RESETTING YOUR PASSWORD

1. Click Forgot Password on the login screen.
2. Enter your email address and CAPTCHA code.
3. Select how you would like to receive your verification code. We recommend receiving your verification code via SMS to ensure prompt delivery.
4. Enter the verification code.
5. Create a new password.
6. Log in using your updated credentials.

TROUBLESHOOTING & FOLDERS

- Enable pop-ups in your browser to view published documents.
- If you cannot download a file after multiple attempts, clear your browser cache and try again.
- FOR YOUR ACTION folder contains items requiring signature or mailing.
- FOR YOUR RECORDS folder contains final copies of your documents.

UPLOADING FILES

1. Click Upload.
2. Select your file(s) and click Open.
3. If files appear in the queue, click Upload All.
4. Confirm files appear under Documents to Firm until reviewed

MANAGING USERS

1. Navigate to Portal Admin > Client Users.
2. Click Add New User to create a new user.
3. Select a user and click Edit to update permissions.
4. Select a user and choose Delete from the menu to remove a user.

Only designated Portal Administrators may add or remove users.

USER ROLES

1. Client Administrator – Full access including user management.
2. Standard User – File access only; cannot manage users.
3. Limited User – Restricted file operations.
4. Read-Only User – Download access only.
5. Upload-Only User – Upload access only.

Need Assistance?

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