



## Signing Up For Client Portal

1. Go to <http://www.poppenfortunecpas.com/>
2. Scroll down to Client Login on the right side
  - a. Click "Sign Up"
  - b. Fill in the required fields
  - c. Submit
3. Elsa Fortune will then approve your access request. You will be emailed a username and password in addition to information on how to proceed.

## Uploading Documents via Client Portal

1. Go to <http://www.poppenfortunecpas.com/>
2. Scroll down to Client Login on the right side.
  - a. Click "Login"
3. Enter Username and Password.
4. Near the top left corner, click "Upload Documents"
5. Near the bottom left corner, click "Add Files"
6. Choose the files you would like to add (one at a time).
7. Once you have chosen all of the files you wish to upload, click "Start Upload"
8. You will see the progress of the upload and should eventually receive a confirmation message as well as a follow up email. This email may take up to 20 minutes to receive.

For security purposes and the safety of your information, we request that clients send all documents through our online portal.