



**Witt Mares, PLC  
and  
iChannel  
Client Portal Guide**

# Portal User Guide for Clients

Welcome to the Witt Mares 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, 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:	<u>https://iportal.wittmares.com</u>
User Id:	<u>Your email address</u>
Password:	<u>Your email address (initially)</u>
Site Name or #:	<u>Not needed</u>

1. Go to the provided website. You will see a login screen.

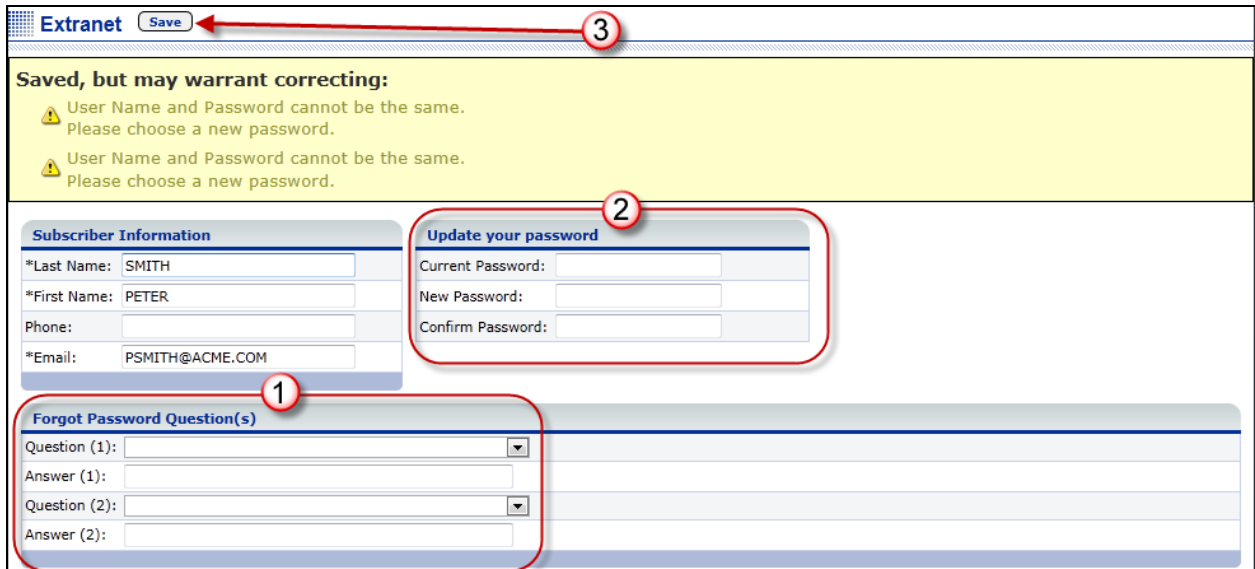


2. Enter the user id, password.
3. Click the **Login** button.

- You will see the Terms and Conditions screen.



- Check the box to agree to the terms and click the **Agree** button.
- 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.



- Click the **Files** link at the top of the page.

## Accessing Your Documents

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

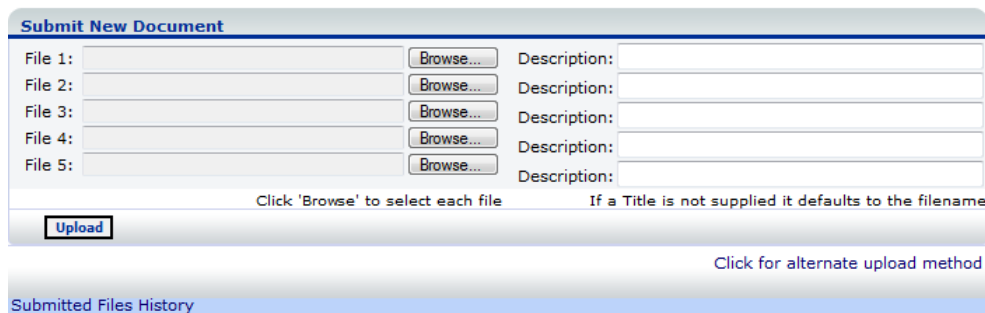
The menu is organized by Channels (headers) and Topics. Security controls what features you will have when working with your documents. Actions you may use are in grey boxes, such as adding documents. Once you click on a topic the documents will appear to the right in the Files List.



## Adding Documents

There are two ways to add documents:

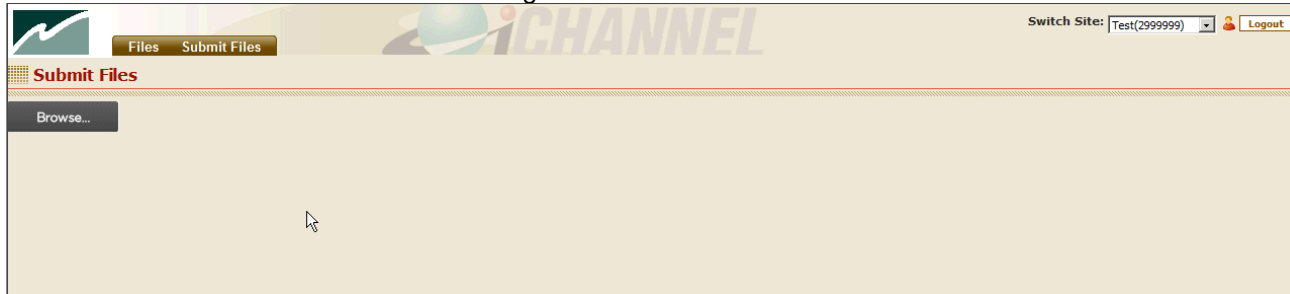
1. **Submit Files** -
  - a. Click the Submit Files button
  - b. The **Submit New Document** screen will open.



The 'Submit New Document' form contains five rows, each for a file. Each row has a text input field for the file name, a 'Browse...' button, and a 'Description:' text input field. Below the form, there is an 'Upload' button, a link for 'Click for alternate upload method', and a 'Submitted Files History' link.

- 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*.
2. **Alternate Upload Method** – this option allows you to submit multiple files simultaneously.
  - a. In the Submit New Document window above select "Click for alternate upload method".

- b. Click the Browse button as show in the image below



- c. Browse to the location where the files you wish to upload currently reside  
d. Click on the file you wish to upload or select multiple files by holding down Ctrl while clicking the files  
e. Select the Open button  
f. The selected files will appear in a list. You have the option to upload the list of documents by clicking the *Upload* button or you may clear the list to select different files by clicking the *Clear List* button.  
g. Blue status bars indicate the status of the upload and when complete the following message will appear



**Document profiles successfully created.**

Click the channel/topic to refresh the contents.

- h. Click the Files tab to return to the document listing or Submit Files tab to upload additional files.  
i. 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.

## Changing Your Password

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

1. Click the My Profile tab at the top 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 Submit at the bottom 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 tab at the top 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 Submit at the bottom 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.

## 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 see the documents or submit files for that particular client