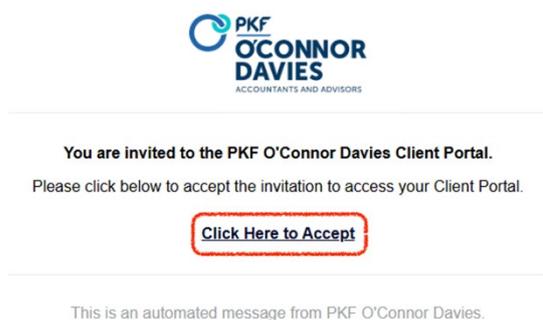


CREATING A PORTAL LOGIN

Once you've been added as a client contact by PKFOD, you'll receive an email invitation to the PKFOD Portal from **clientportal@pkfod.com**. We recommend adding this email address to your safe senders list to prevent it from being blocked by spam filters.

Depending on your email security settings, you may need to check your junk or spam folder.

The email you receive will look like the below. Please do not reply to the email as it will not reach anyone.



To accept the invite, please click '**Click Here to Accept**'. This will be highlighted in red within the email, as shown below.

If you have a Microsoft 365 or Microsoft personal account, you will then be prompted to sign in to your Microsoft account to access the portal.

If you don't have a Microsoft email account, you will be prompted to click on a button that will send a verification code to the email address that we have registered for you.

Once you have received the verification code, you will need to enter it where prompted and then select 'Sign In'. You will then have access to the portal.

If you agree to the permissions we request, select 'Accept'. **Please note** that you will need to accept these permissions to gain access to the portal

To keep your account secure, you will then be prompted to enrol in multi-factor authentication using the Microsoft Authenticator app.

If at this point, or at any point when using the client portal, you have any issues then please use the ["Contact Us"](#) form or get in touch with your usual point of contact at PKFOD.

Permissions requested by:

 **PKF O'Connor Davies**
ocdcrm.onmicrosoft.com

By accepting, you allow this organisation to:

- ✓ Receive your profile data
- ✓ Collect and log your activity
- ✓ Use your profile data and activity data

You should only accept if you trust PKF O'Connor Davies. **PKF O'Connor Davies has not provided links to their terms for you to review.** You can update these permissions at <https://myaccount.microsoft.com/organizations>.
[Learn more](#)

This resource is not shared by Microsoft.



Let's keep your account secure

We'll help you set up another way to verify it's you.

[Use a different account](#)

[Learn more about verifying your identity](#)

[Next](#)

Install Microsoft Authenticator



Install the app on your mobile device, then come back here to continue.



1.

Set up a different authentication app

Set up a different way to sign in

2.

[Next](#)

Now pair Authenticator with your account



1.

When finished, come back to this setup experience.

[Pair your account to the app by clicking this link.](#)

Show QR code

Set up a different way to sign in

2.

[Next](#)

CLIENT PORTAL ACCESS

You can access the portal by clicking the link in the notification email you receive when documents are uploaded to your portal, or at any time by visiting our website and selecting 'Client Portals' at the top of the [PKFOD Website](#).



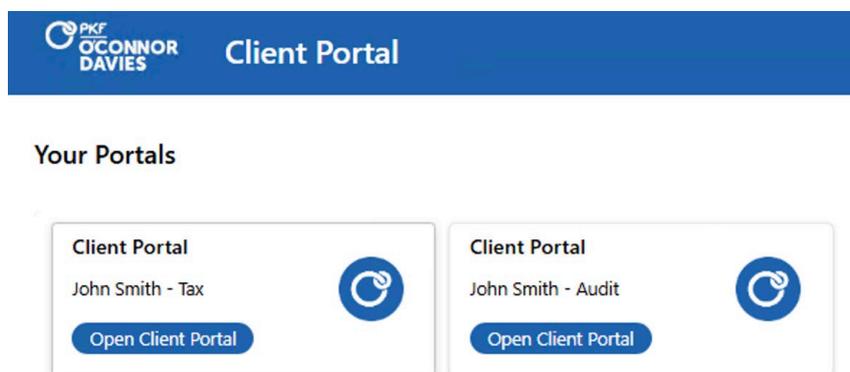
You can also access it directly via this link:

<https://ocdcrm.sharepoint.com/sites/ClientPortal>

For security reasons, you'll be asked to enter a verification code every 7 days. Depending on your device's security settings, you may also be prompted for additional verification steps.

USING YOUR PORTAL

Once logged in, you will then be able to see the one or more portals you have access to, as below.



Click on the 'Open Client Portal' to go to that portal and your documents will be stored within.

Uploading Files

To upload files to the portal you can simply click on "Create or upload" and then 'Files upload' or 'Folder upload' and browse for the file(s) you want to upload on your device.

