

PKFOD Client Portal – External User Guide

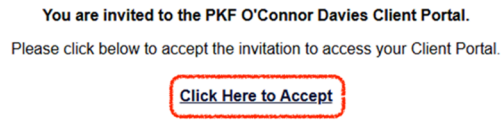
Creating a Portal Login

Once you have been added as a client contact by PKFOD, you will receive an email invitation to the PKFOD Client Portal from **clientportal@pkfod.com**.

- Please check your junk or spam folder if you do not see the email. We recommend adding this email address to your safe senders list.
- Do not reply to the invitation email, as replies are not monitored.
- **Please Note:** depending on the device used to access the portal, the steps below may vary slightly.

To accept the invitation:

1. Open the email from clientportal@pkfod.com and then Click '**Click Here to Accept**'.



This is an automated message from PKF O'Connor Davies.

Signing In/ Setting up Authentication

If You Have a Microsoft 365 or Personal Microsoft Account

You will be prompted to sign in using your existing Microsoft account credentials. Proceed to the next section: Enrolling in Multi-Factor Authentication (Microsoft Authenticator).

If You Do Not Have a Microsoft 365 Account

1. Select the option to receive a verification code.

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.



2. A code will be sent to your registered email address (email provided to use with the PKFOD portal).
3. Enter the verification code when prompted.
4. Select '**Sign In**'.

If prompted to grant permissions, select '**Accept**' to continue.

Enrolling in Multi-Factor Authentication (Microsoft Authenticator)

To safeguard our clients' information and meet PKFOD's security standards, please set up Multi-Factor Authentication (MFA) using the Microsoft Authenticator app. MFA is the only approved method to access PKFOD portals.

Download Microsoft Authenticator on your mobile device

Download the **free Microsoft Authenticator app** (published by Microsoft Corporation). Do not download 'Authenticator Lite' or any third-party apps.

If you are accessing the portal from your computer you will need to install the Authenticator App on a mobile device. Click [HERE](#) for instructions on how to get the correct app for your device or scan the QR code below.

QR code for Apple app store



QR code for Google Play Store

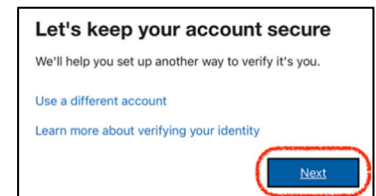


If you are viewing this guide on your Mobile device, you can install Authenticator from the [Apple app store](#) or install Authenticator from the [Google Play store](#).

Once the app is installed on your device follow the prompts on the screen to set up your account.

If you are using a computer to access the portal:

1. Sign into the **Client Portal** using the link from your invitation email on your computer .
2. Select '**Set up Authenticator app**' when prompted.
3. A **QR code** will appear on your computer screen.
4. Open the **Microsoft Authenticator app** on your phone.
5. Tap '+ or **Add account**'.
6. Select '**Work or school account**'.
7. Choose '**Scan QR code**'.
8. **Scan the QR code** displayed on your computer screen.
9. Select '**Next**' on your computer.
10. **Approve the test notification** sent to your phone.



If you are using your phone to access the portal:

1. Open the **Client Portal** link from your invitation email.
2. **Sign in** when prompted.
3. Follow the on-screen instructions to **set up the Authenticator app**.
4. Tap '+ or **Add account**' in the Authenticator app.
5. Select '**Work or school account**'.
6. Follow the prompts to complete setup.
7. **Approve the test notification**.



If You Already have the Microsoft Authentication app

1. Open the **Authenticator app**.
2. Tap '+ or **Add account**' in the Authenticator app.
3. Select '**Work or school account**'.

If using a computer:

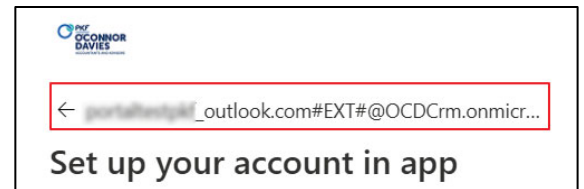
4. Choose '**Scan QR code**'.
5. **Scan the QR code** displayed on your computer screen.
6. Select '**Next**' on your computer.

If using your phone:

4. Follow the on-screen prompts to complete setup.
5. Approve the test notification sent to your phone.

Important Information

- You may see your email address displayed with #EXT#@OCDCm.onmicrosoft.com. This is normal and can be ignored, you will use the email address that the invite was sent to as your login.
- For security purposes, you may be asked to verify your identity **every 7 days**.
- If you get a new device you might need to reset your authentication to regain access to your portal(s).
- If you experience any issues, contact your usual PKFOD representative for assistance or please use the '[Contact Us](#)' form. Please include some identifying information ie. your PKF O'Connor Davies' client number, your Full Name or Company Name and/or email address.



Client Portal Access - After you have set up authentication

You can access the portal:

1. By clicking the link in a notification email when documents are uploaded.
2. By visiting the PKFOD website and selecting 'Client Portals'.
3. Directly via: <https://ocdcrm.sharepoint.com/sites/ClientPortal> which you can bookmark in your browser for easy access going forward.

PKFOD Client Portal – Using your Portal

Ways to Access Portals

- Click the **link in a notification email** when documents are uploaded (takes you directly to the portal a files was uploaded in).
- Visit the PKFOD website and select '**Client Portals**'.
- Bookmark this link: <https://ocdcrm.sharepoint.com/sites/ClientPortal> so you can access easily going forward.

To sign in:

1. Enter your email address,
2. A number will appear on the portal screen, and at the same time, you will receive a notification from Microsoft Authenticator on your phone. enter the number shown on the portal screen into the Authenticator app, if you do not get a notification, please open the authentication app.
3. Enter or select the number displayed to complete sign-in.

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Approve sign in request

Open your Authenticator app and approve the request. Enter the number if prompted.

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Didn't receive a sign-in request? **Swipe down to refresh** the content in your app.

I can't use my Microsoft Authenticator app right now

[More information](#)

If you are accessing the portal from your mobile device, you will need to return to the portal page after approving the request.

Please Note: allow a few seconds for the page to update automatically. Do not refresh the page. Refreshing will trigger a new authentication request.

Accessing All My Client Portals

This view is accessible via the PKFOD website by selecting '**Client Portals**' or using this link <https://ocdcrm.sharepoint.com/sites/ClientPortal> which you can bookmark in a browser.

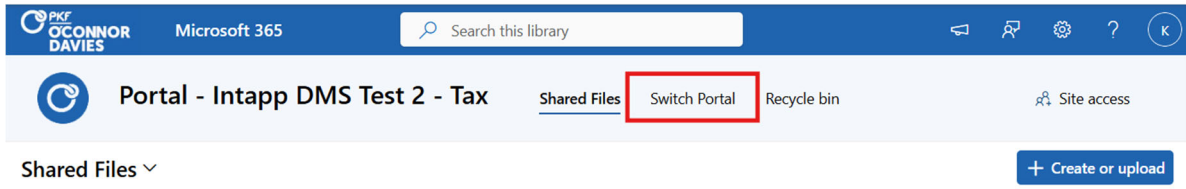
Be sure to refresh your browser if you are not seeing all your portals.

Select '**Open Client Portal**' to access your documents.

The screenshot shows the PKFOD Client Portal interface. At the top, there is a blue header with the PKFOD logo and the text 'Client Portal'. Below the header, the section is titled 'Your Portals'. There are five cards displayed in a grid. Each card has the title 'Client Portal' and a subtitle. The first card has the subtitle 'Intapp DMS Test 2 - Tax' and a red box around the 'Open Client Portal' button. The other cards have subtitles: 'Intapp DMS Test 1 - Audit', 'Temp Tax/BSG Storage - Tax', 'Temp A&A Storage - Audit', and 'Intapp DMS Test 3 - Tax'. Each card also features a circular refresh icon and an 'Open Client Portal' button.

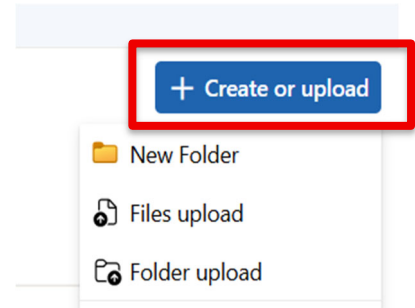
Switching Between Portals

When in a portal to get back to the main page that lists all your portals you just need to click **“Switch Portal”**



Uploading Files

1. Select **'Create or upload'** in the upper righthand corner
2. Choose **'Files upload'** or **'Folder upload'**.
 - a. **Please Note:** you may need to select this option twice on mobile devices
2. Browse and select the file(s) from your device.
3. Confirm the upload.



Checking Portal Activity

To see activity details to see what has already been uploaded you can click **Details** in the upper righthand corner., then scroll down to the **activity** feed.

