

**Initial Access/Logging In**

- Once you have provided our office with your contact information, we will grant you access to an online document portal through OfficeTools.
- You will receive two emails from: [no-reply@firmportal.com](mailto:no-reply@firmportal.com)
- The first email will contain your temporary password. Click the “Sign in” button.

Your Client Portal Account Information



David C. Bryant, CPA Firm Portal <no-reply@firmportal.com>  
To [Redacted]



[If there are problems with how this message is displayed, click here to view it in a web browser.](#)



Welcome to the David C. Bryant, CPA Portal!

Your Portal account has been created and you can now setup your account on any device.

Please click the link below and use the temporary password CVE1JDR2EW.

[Sign in to your account](#)

**Portal Features**

- Secure MFA Login
- Upload/Download Documents
- One login to access all your accounts.

Powered by



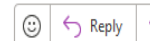
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- The second email will give you the name of the person/business whose portal you have been granted access to.

David C. Bryant, CPA portal access updated



David C. Bryant, CPA Firm Portal <no-reply@firmportal.com>  
To [Redacted]



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Hello Tom,

You have been given access to Smith, Tom on the David C. Bryant, CPA portal.

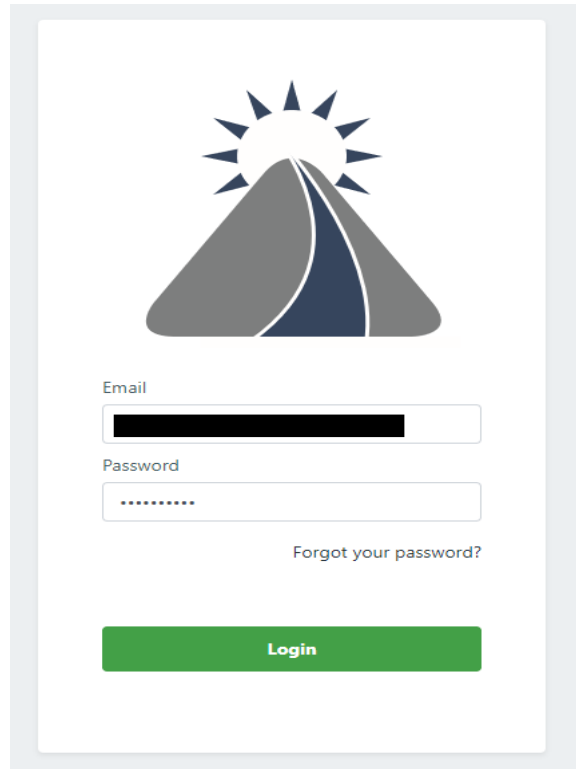
[Click Here](#) to log in and get started.

Powered by



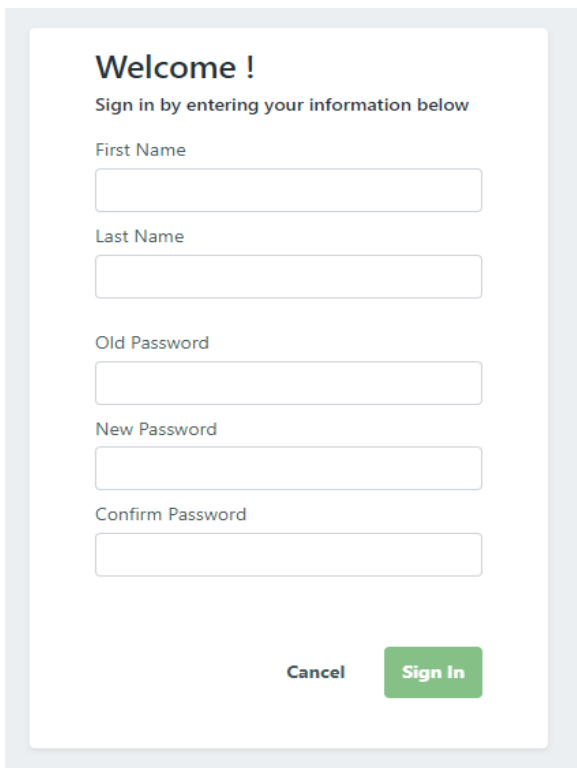
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- Enter the email address you received the access notifications on and enter the temporary password provided in the first email. Then, select “Login”.

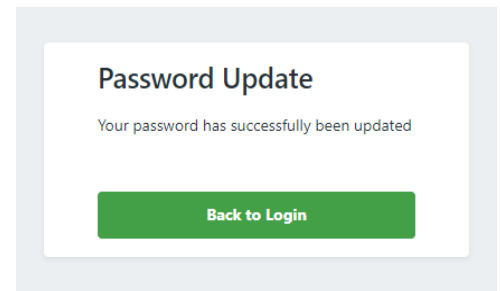


The login screen features a logo at the top center depicting a sun with rays rising over a mountain range. Below the logo are two input fields: "Email" and "Password". The "Email" field contains a redacted address, and the "Password" field contains a series of dots. A link for "Forgot your password?" is positioned below the password field. At the bottom center is a green button labeled "Login".

- Enter the required fields. For “Old Password” enter the temporary password again. Select “Sign In”.
- You will then receive a “Password Update” screen, select the “Back to Login” button.
- Log in with your email address and your new password.



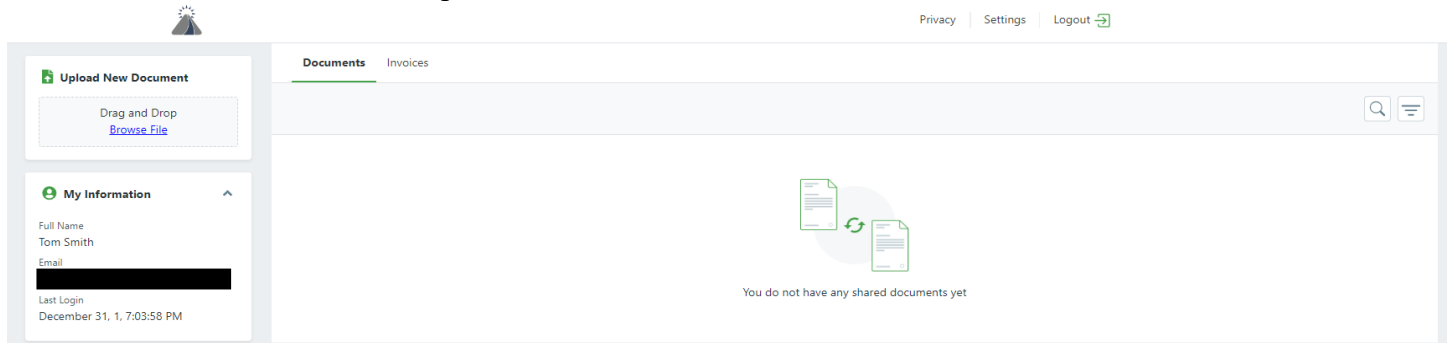
The "Sign In" screen is titled "Welcome !" and includes the instruction "Sign in by entering your information below". It contains five input fields: "First Name", "Last Name", "Old Password", "New Password", and "Confirm Password". At the bottom right, there are two buttons: a "Cancel" button and a green "Sign In" button.



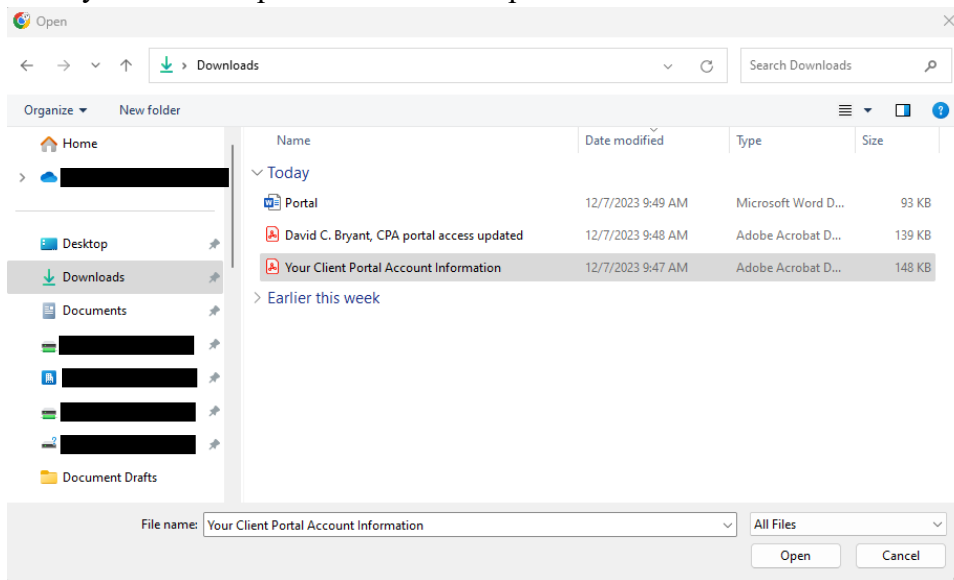
The "Password Update" screen displays the message "Your password has successfully been updated". At the bottom center, there is a green button labeled "Back to Login".

## Uploading Documents

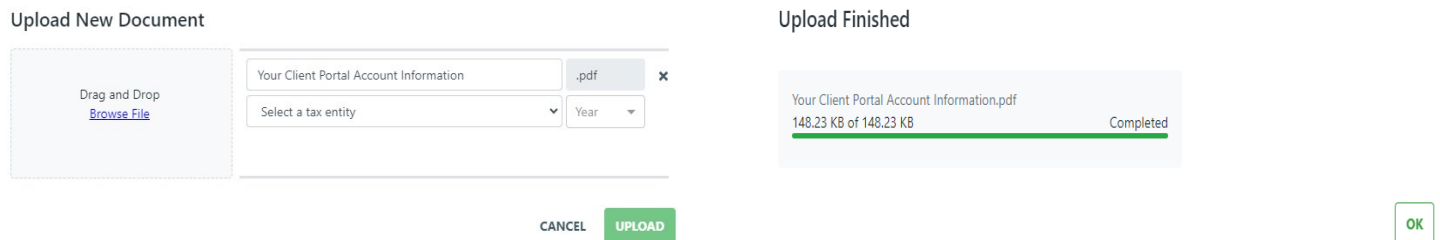
- Once logged in, you will see the screen below. You can now upload documents by selecting the blue “Browse File” button in the top left corner.



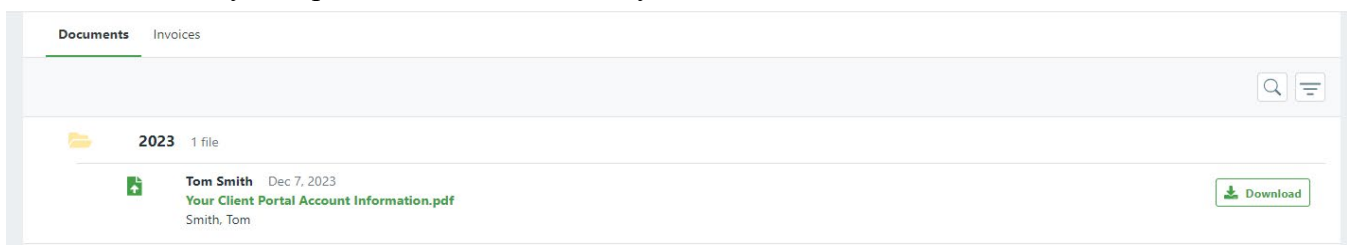
- Select the document you want to upload and select “Open”.



- Under “Select a tax entity” chose the name of the person/business that the document pertains to. You can omit the year and select “Upload”.
- You will receive an “Upload Finished” screen when completed and you can select the “OK” button.



- You can now see your uploaded document under your “Documents” list.



- Our office will receive an email notification any time that you upload a document.

**Downloading Documents**

- When our office uploads a document to your portal, you will receive an email notification. You can select the link in the email to login to the portal and view the document.

A new document from David C. Bryant, CPA is available to download



David C. Bryant, CPA Firm Portal <no-reply@firmportal.com>  
To [Redacted]



[If there are problems with how this message is displayed, click here to view it in a web browser.](#)



Hello Tom,

David C. Bryant, CPA has uploaded the following document to the portal:

**Smith, Tom**

- Test Upload Document.pdf *uploaded by Stephanie Fulco*

Please login to <https://dcbcpa.firmportal.com/> to view this document.

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- Once logged in, the uploaded document will show under the “Documents” tab.
- Click the green name of the document and then select “Preview” to view the document in your web browser or click the green “Download” button to the right of the document title to download it to your device.

The screenshot shows the 'Documents' tab in a web portal. At the top, there are tabs for 'Documents' and 'Invoices'. Below the tabs, there is a search icon and a menu icon. A folder icon is followed by the text '2023 2 files'. The list contains two items:

Icon	Name	Date	Action
	<b>[Redacted]</b> Test Upload Document.pdf Smith, Tom	Dec 7, 2023	<a href="#">Download</a>
	<b>Tom Smith</b> Your Client Portal Account Information.pdf Smith, Tom	Dec 7, 2023	<a href="#">Download</a>