

To upload a file to our portal. Go to our website at kingcpas.com, and click on the client portal button.

You will need to log in with the user name and password that has been provided by King, King & Associates (need to observe the upper case letters)

After you have logged in to the client portal, you **may** be asked to run a Java applet. You must accept the applet for the screen to function properly.

Upload:

On the left hand side of the screen you should see a section that says "Upload" and then hit "Upload – Skip" which will bring up the files folder. From here you will locate the files you want to upload.

Once you have located the file(s) that you want to upload to your client do the steps below:

Find the Action button and click that.

From that menu select Upload. If it gives you the options of Upload – Skip or Upload – Overwrite, choose the Skip (unless you are overwriting a file then chose overwrite).

The files must be uploaded to the "home" folder under the Disk Station tree. You should see this in the section above My Computer.

Once it has completed uploading you can logout. Please send an email to notify me that you have uploaded a file.

Download:

Select file to download, then click the action button and select the download option.