

Instructions for Clients to add portal users:

- Click the "Client Users" button on the right
- Click the "Add New User" button on the left
- Complete the required fields of the user setup screen (those with a *). Note that the person's email address should be put in the Login ID field.
- Choose the appropriate security role
- Click "Save and Close"
- Make sure the box next to the person's name is checked - this means they have access to the portal.