

Activating the Secure Client Portal for a Matter

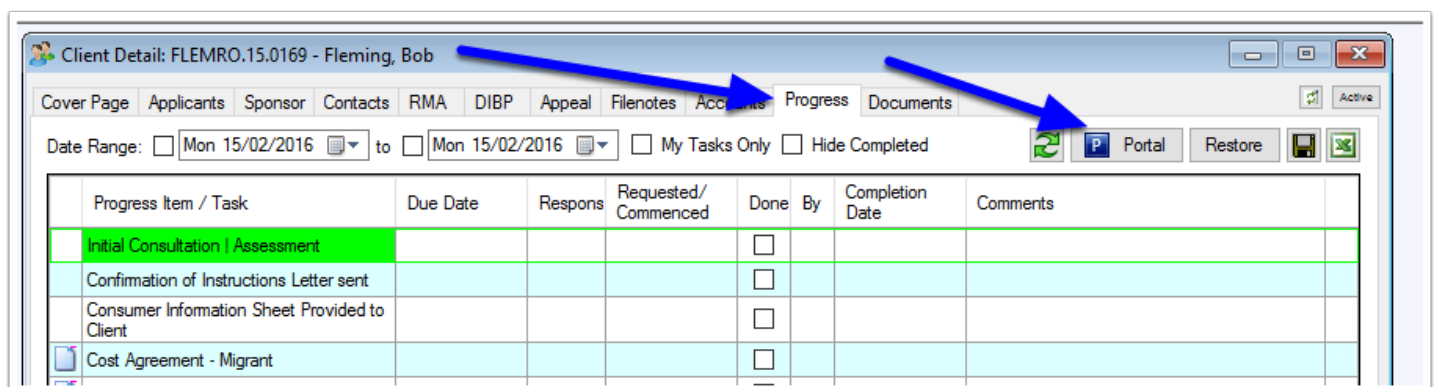
This section describes how to add a matter to the Secure Client Portal and notify your client of their access details.

Suggestion - when you first use the portal, you might like to set up a dummy matter with your own email address and add that matter to the Portal. That way you will be able to log in to the portal yourself and see exactly what your clients will see when they use the Portal.

1. Open the Portal Form




Open the matter, click on the *Progress* tab and then click the *Portal* button.


Note, if you don't see a Portal button, you need to [Set Up the Portal](#) for your firm.



Client Detail: FLEMRO.15.0169 - Fleming, Bob

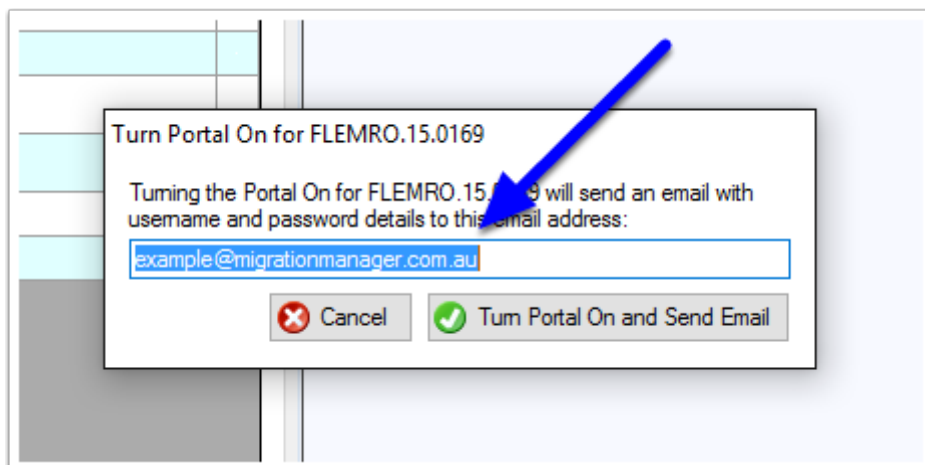
Cover Page Applicants Sponsor Contacts RMA DIBP Appeal Filenotes Accounts **Progress** Documents

Date Range: ☐ Mon 15/02/2016 to ☐ Mon 15/02/2016 ☐ My Tasks Only ☐ Hide Completed  **P Portal** Restore  

Progress Item / Task	Due Date	Respon	Requested/ Commenced	Done	By	Completion Date	Comments
Initial Consultation / Assessment				<input type="checkbox"/>			
Confirmation of Instructions Letter sent				<input type="checkbox"/>			
Consumer Information Sheet Provided to Client				<input type="checkbox"/>			
 Cost Agreement - Migrant				<input type="checkbox"/>			

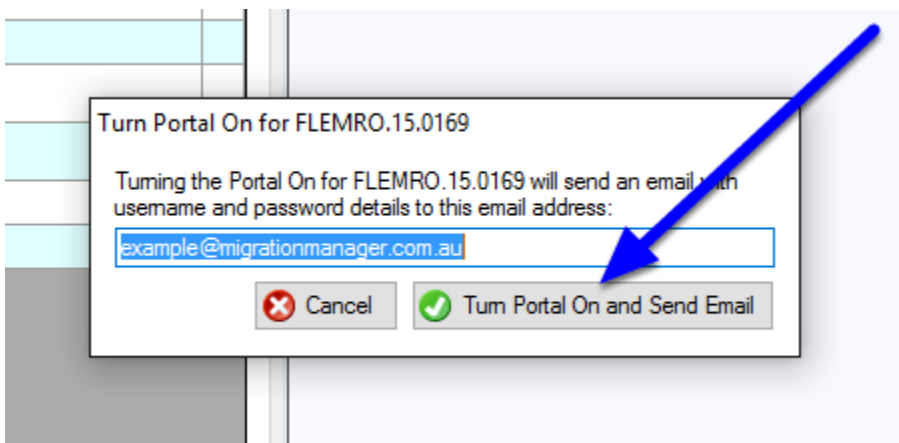
2. Turn on Portal for this Matter

If this is the first time the portal form has been opened for this matter, Migration Manager will need to add the matter to the Portal and generate the Client's logon details. When you click the Portal button the 'Turn Portal On' window will appear. The client's email address will be displayed. Check if the email address is correct. If you want to send the email to a different email address, enter it here.



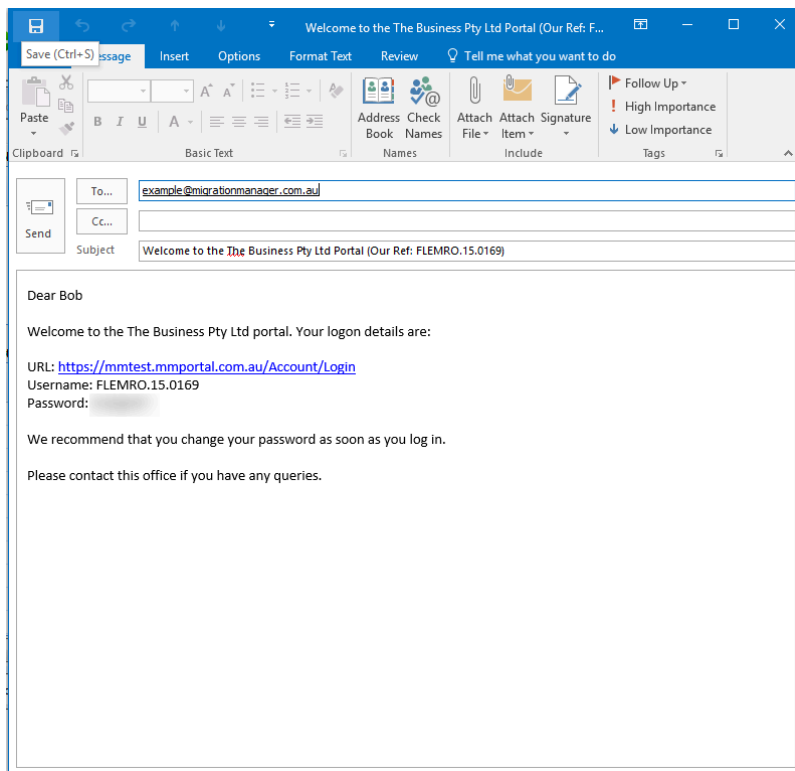
3. Generate Logon Details

When you are ready to turn the Portal on for this matter, click Turn Portal On and Send Email.



4. Send Portal Logon Details

Migration Manager will now add this matter to your Client Portal and generate an email to be sent to your Client which contains their logon details.



5. Send the email to your Client

Click **Send** on your Outlook Email.