WIPFLi LLP
CPAs and Consultants

MyPortal Frequently Asked Questions

Q. How do I drag and drop files/folders?
A. Using your mouse, click and hold on the desired file or folder, and drag the item to desired new destination and release. Any folder that you drag and drop will also move any subfolders and/or files contained within.

Q. How do I upload multiple files?
A. When browsing your local system to determine which files to upload, you may use *shift* to select a group of files in a sequence, or use *ctrl* to select a group of non-sequential files.

Q. My phone doesn't allow me to download the Authy application after I click on the texted link, what do I do?
A. If your phone is not allowing you to sign in to download the app from the link, you should manually go to the app store and download Authy from there, then run the registration.

Q. How do I get to the portal?
A. Point your web browser to https://MyPortal.AssurityRiver.com

Q. What browsers are supported?
A. MyPortal is designed to work with Internet Explorer 8 and above, Google Chrome, Safari, Opera, and Mozilla FireFox 4 or higher. The Wipfli portal has rolling support for all modern browsers. Older browsers such as Internet Explorer 8 & 9 have limited support and functionality.

Q. I keep getting a message that my email address is 'invalid.' What should I do?
A. Contact your organization's MyPortal administrator.

Q. I forgot my password. What should I do?

A. On the 'Log In' screen click on 'Click here to reset your password.' Enter your email address on the following screen. If your account is enabled, a password reset link will be delivered to your email within a few minutes. If you do not receive an email contact your organization's MyPortal administrator.

Q. I don't know my password. What should I do?

A. On the 'Log In' screen click on 'Click here to reset your password.' Enter your email address on the following screen. If your account is enabled, a password reset link will be delivered to your email within a few minutes. If you do not receive an email

contact your organization's MyPortal administrator.

Q. How do I add a document?

A. To upload a document, select the desired folder and click 'Upload File,' click 'Choose File' from the resulting dialog box and choose the desired file. Click Submit to upload the file. (Note: Only organization MyPortal administrators and Assurity River Group have permissions to upload documents.)

Q. How do I add a folder?

A. Select the desired parent folder and click 'New Folder.' Name the folder and click 'Ok.'
(Note: Only organization MyPortal administrators and Wipfli have permissions to upload documents.)

Q. How do I delete a document?

A. Select the desired document and click 'Delete.' If you select a folder and click 'Delete.' You will be prompted to confirm your decision.

Q. How do I delete a folder?

A. Select the desired folder and click 'Delete.' All files and folders inside that folder will also be deleted. Once confirmed that folder and all files and folders inside that folder will also be deleted.

Q. How do I add another user if I'm not a MyPortal administrator?

A. Contact your organization's MyPortal administrator.

Q. What is Authy?

A. Authy is a multi-factor authentication (MFA/2FA) solution. When you enter your Authy code you prove to MyPortal that you know a shared secret (your password) and that you have access to the expected device (your cell phone).

Q. What if I don't have a smart phone?

A. Upon registration, you will receive the same Authy installation text message as you would on a smart phone. If not using a smart phone, you may disregard this message and proceed to the portal. You have the option to have Authy send an

SMS message upon request. Upon login when prompted to enter your "Authy Token" click the link that reads 'Request SMS Message.' A new window will open confirming an SMS message will be sent to the cell phone number on file with Authy. This option also applies if you are using a text to email number. Then enter the code that Authy sent in the SMS as your "Authy Token."

Q. Our email service is down and I forgot my password! What do I do?
A. Contact your MyPortal administrator.

For any other issues with the MyPortal site, please contact
Wipfliportalsupport@wipfli.com