

# Client Invite to Portal Email Template

## EXISTING CLIENTS: Connect/login to the Portal

Create your Portal Profile

To ensure we can get you up and running quickly, and give you the access you need to your Client Portal, get started here: [LINK TO PORTAL](#)

Next, you'll be asked to configure your username and password to complete your registration!

With the Botkeeper Client Portal, you'll be able to:

- Connect your bank and credit cards to our secure portal with just a few clicks
- Easily upload and share your financial documents with us
- Keep everyone aligned, and achieve more as a team
- Communicate with our entire accounting team in one secure place
- Get access to an interactive dashboard to monitor the financial health of your business
- And more!

Thank you for being an amazing client, and if you have any questions, feel free to reach!

Your Trusted Partner,  
Michael Scott, Dunder Mifflin LLC