



Baker Hill NextGen® Troubleshooting Client Portal Users

If your financial institution purchased and uses the Client Portal with Baker Hill NextGen®, you must create Client Portal Users in NextGen in order for your customers to log into and use the Client Portal. To assist you in answering questions and/or troubleshooting issues your customers might have with the Client Portal, NextGen Help contains a series of topics that are documented from the client portal user's perspective. In the table of contents, navigate to **Modules > Client Portal | Online Loan Application > Using the Client Portal**. You may print these Help topics to a PDF file to then send to a client portal user.

This document includes information on how to troubleshoot issues with client portal users.

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Creating Client Portal Users

In NextGen, Client Portal Users may be added one at a time or en masse using a Client-based query.

Add One Client Portal User

To add one client portal user at a time, reference the **Client Portal Users** topic in NextGen Help. This topic may be found by navigating in the table of contents to **Modules > Client Portal | Online Loan Application > For NextGen Users > Client Portal Users**. As indicated in the Help topic, the e-mail that is automatically sent to the client portal user will contain a link for the client portal user to setup their online account, which includes creating their password. The link is valid for a certain number of hours as configured by your System Administrator.

Add Client Portal Users en masse

To add multiple client portal users at a time, reference the **Action Bar: Clients** topic in NextGen Help. This topic may be found by navigating in the table of contents to **Reporting and Correspondence > Query Builder > Query Results > Action Bar: Clients**. As indicated in the Help topic, a .csv file will be generated and downloaded by the browser that includes the raw data of the client portal user information. You (or someone at your financial institution) must use the data in this .csv file to disseminate the information to the client portal users. This should include the link that the client portal user needs to use to setup their online account, which includes creating their password. The link, by default, is valid for 30 days, but may be changed as part of the steps to create the client portal users en masse.

Supported Internet Browsers

Similar to Baker Hill NextGen®, the Client Portal may be used on these supported internet browsers:

- Google Chrome (recommended)
- Microsoft Edge (based on Chromium, released 1/15/2020)
- Apple Safari

Client Portal URL

The URL to access the Client Portal is very similar to the URL to access NextGen. Per the **Accessing the Client Portal** Help topic, found by navigating in the table of contents to **Modules > Client Portal | Online Loan Application > Using the Client Portal > Accessing the Client Portal**, client portal users should bookmark the URL once on the Login page after creating their password.

The beginning of the URL is the same as if a NextGen user were accessing NextGen in the production environment: <https://nextgen.bakerhillsolutions.net>. However, since client portal users access the Client Portal and not NextGen, the URL must contain further information, including /clientportal/login/ followed by the name of your financial institution's database, which you can obtain from Baker Hill if you do not know it. As an example, if the database name is "myfinancialinstitution", the URL to access the Client Portal would be <https://nextgen.bakerhillsolutions.net/clientportal/login/myfinancialinstitution>.

Clear Browser Cache

It may be necessary for the client portal user to clear their browser cache (e.g., receiving an unexpected error when attempting to login to the Client Portal). Here are links to websites that document how to clear browser cache for the three supported browsers:

- Google Chrome: [Clear cache & cookies](#)
- Microsoft Edge (based on Chromium, released 1/15/2020): [View and delete browser history in Microsoft Edge](#)
- Apple Safari: [Clear your browsing history in Safari on Mac](#)

You may do other internet searches to find more information about how to clear browser cache.

Disable Browser Pop-up Blockers

It may be necessary for the client portal user to disable pop-up blockers in the browser (e.g., after logging in to the Client Portal, nothing displays). Here are links to websites that document pop-up blockers, which could be used to disable them, for the three supported browsers:

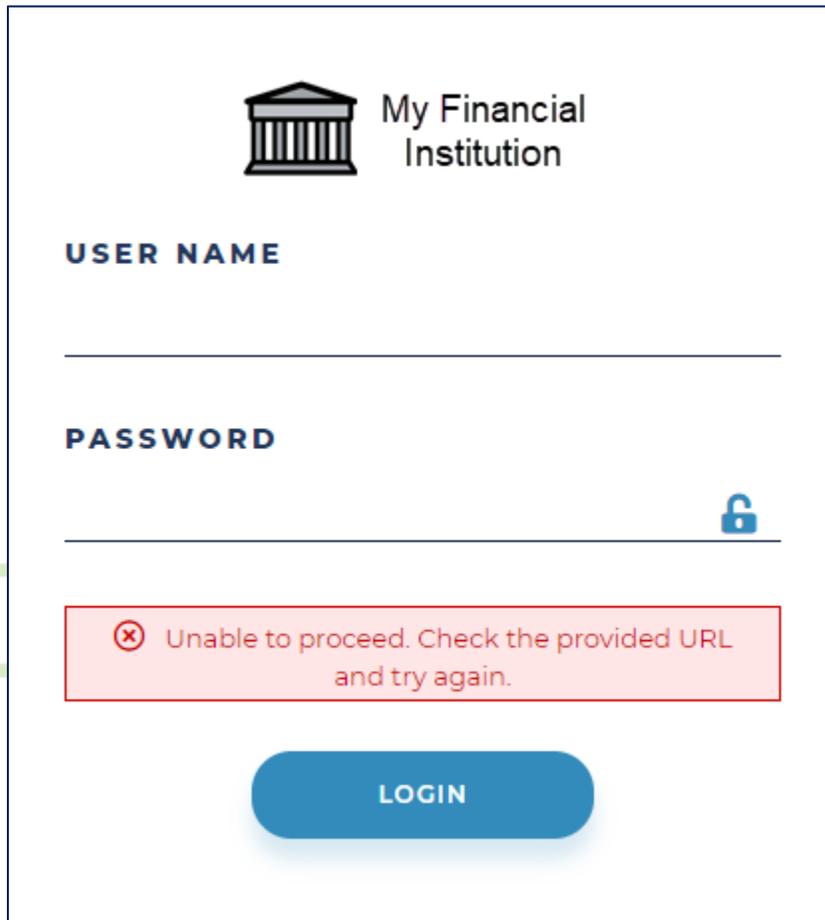
- Google Chrome: [Block or allow pop-ups in Chrome](#)
- Microsoft Edge (based on Chromium, released 1/15/2020): [Block pop-ups in Microsoft Edge](#)
- Apple Safari: [Block pop-ups in Safari on Mac](#)

You may do other internet searches to find more information about how to disable pop-up blockers.

Issues and Resolutions

Unable to Proceed

Issue: The client portal user is on the Login page but an “Unable to proceed. Check the provided URL and try again.” message is displayed.

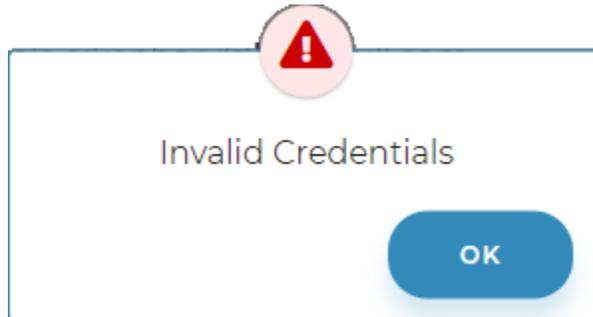
A screenshot of a web login page for "My Financial Institution". At the top center is a black icon of a classical building with columns. To its right, the text "My Financial Institution" is displayed in a dark blue font. Below this, there are two input fields. The first is labeled "USER NAME" in bold dark blue text. The second is labeled "PASSWORD" in bold dark blue text and includes a small blue padlock icon on its right side. Below the password field is a red-bordered error message box with a red 'x' icon and the text "Unable to proceed. Check the provided URL and try again." At the bottom center of the page is a blue rounded rectangular button with the word "LOGIN" in white capital letters.

There is one possible resolution:

1. The client portal user is not using the correct URL. Specifically, the URL is missing the name of the database. Have them correct the URL (per the information in the Client Portal URL section above) and try again.

Invalid Credentials

Issue: The client portal user attempts to login to the Client Portal but receives an Invalid Credentials message.



There are three possible resolutions:

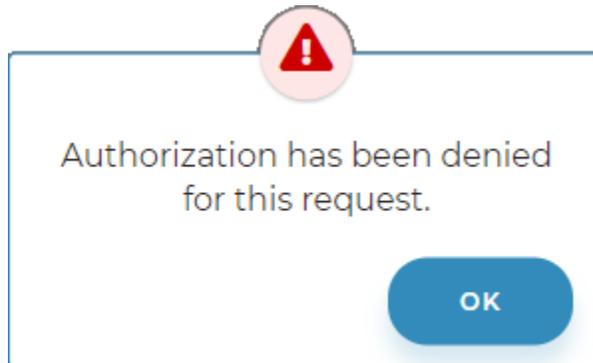
2. The client portal user is not using the correct URL. Have them correct the URL (per the information in the Client Portal URL section above) and try again.
3. The client portal user is not entering their correct User Name and/or Password. In NextGen, verify their User Name. Then either reset their password for them or have them use the Forgot Password functionality, if your financial institution has configured that for use.
4. The client portal user has no security permissions for the Client Portal.

<input type="checkbox"/>	Category
<input type="checkbox"/>	View Items
<input type="checkbox"/>	Upload Items
<input type="checkbox"/>	View Messages
<input type="checkbox"/>	Insert Messages
<input type="checkbox"/>	Accept Opportunities
<input type="checkbox"/>	Admin User
<input type="checkbox"/>	Edit Application
<input type="checkbox"/>	View Application
<input type="checkbox"/>	View Signed Documents

In NextGen, update the Client Portal User's record by assigning appropriate security permissions.

Authorization has been denied for this request

Issue: The client portal user receives an “Authorization has been denied for this request” message when attempting to navigate to the Client Portal using a saved bookmark.



There is one possible resolution:

1. The bookmark was added *after* logging in to the Client Portal rather than *before* logging in to the Client Portal. Have the client portal user correct the URL (per the information in the Client Portal URL section above) and try again.