

Client Portal User Guide

NetClient CS/File Exchange allows users and staff to share files in a secure environment.

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Login

www.midiowacpas.com

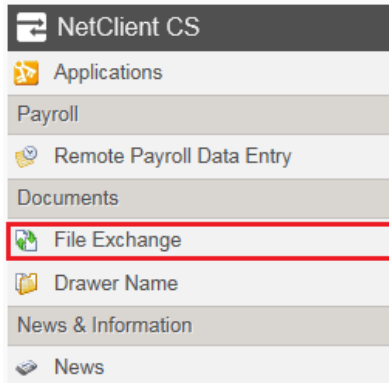
1. Locate the Client Login section and enter the username and password, click on login.

The screenshot shows a 'Client Login' form with the following elements:

- Title: Client Login
- Input field: Username
- Input field: Password
- Button: Login
- Link: Forgot your password?

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2. The File Exchange section allows you to upload/download files to share with Mid-Iowa CPAs staff. In the NetClient CS tab of the navigation pane, click the File Exchange link in the Documents section.



Resetting your password

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1. Locate the Client Login section and enter the username and password, click on the Forgot your password? link

A screenshot of the 'Client Login' form. The form is titled 'Client Login' and contains three input fields: 'Username', 'Password', and a 'Login' button. Below the 'Login' button is a link that says 'Forgot your password?'. The form is set against a light gray background.

2. From here you can either have an email sent with a password reset link or you can utilize your security questions
3. Enter your login and email address and then select the method you want to use to retrieve your password.
 - a. If you select to receive an email, the email will come from support@netlinksolution.com and a temporary NetClient CS password will be provided
 - i. Use this temporary password to log into your account
 - ii. You will be prompted, upon login, to set your new password

Multi-Factor Authentication (MFA)

As a user of the client portal you can utilize multi-factor authentication. This would require you to sync a mobile device to your account and then this device would be needed in order to log into your account.

Setting up multi-factor authentication

1. Click on your name in the top right corner of the screen, select Manage Multi-factor Authentication
2. Click on Add option, enter your login password, click on enter
3. Click on Get Started
4. Select the Multi-factor option you would like to use
 - a. Thomson Reuters Authenticator (recommended)
 - b. Third-party app
 - c. Multi-factor device (code generator)
5. On your mobile device – open the app store, download and install the appropriate app
6. After installing and opening the app, click Next
7. In the Thomson Reuters Authenticator app, click on the plus sign in the top right corner and scan the barcode that appears on your computer screen.
8. A message stating “Pairing Successful!” will appear on both your mobile device and computer screen.
 - a. Click the “Got It” button on your mobile device
 - b. Click on Finish on your computer
9. After you click finish, you will see a screen with Emergency Access Codes. You can copy these to a safe place on your computer or print and file. These codes can be used to access your account (in conjunction with your login and password) if/when you do not have access to your mobile device.
10. Click Done

Understanding the next steps after enabling multi-factor authentication

Congratulations! You've successfully set up multi-factor authentication (MFA) for your account. Now that you've made your account and your data more secure, your login and workflow processes will undergo some changes.

1. When you log into our website, you'll be prompted to verify your account via your selected MFA method. This means approving your sign-in attempts through a mobile app like the Thomson Reuters Authenticator, which helps ensure that you are the only person accessing your account.
2. When you select electronic files for transmission from UltraTax CS, you'll be prompted to verify your account via your selected MFA method prior to transmitting the e-files to the taxing agency.
3. If you currently do not have access to your mobile device, contact Mid-Iowa CPAs and we will generate a code for you (sent via email)

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Disabling MFA

1. Click on your name in the top right corner of the screen, select Manage Multi-factor Authentication
2. Click on Remove to the right of the listed device, enter your login password, click on enter

New Device for MFA

1. Follow the steps for Setting up multi-factor authentication
2. Follow the steps for Disabling MFA

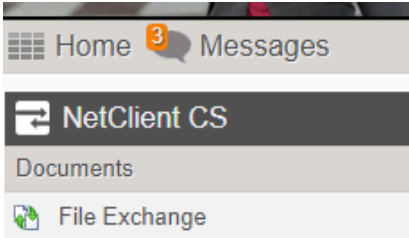
Issues with MFA?

Should you have any issues with multi-factor authentication, please call Mid-Iowa CPAs for assistance. A link to common issues and how to trouble shoot has been included for your convenience.

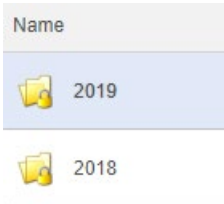
https://cs.thomsonreuters.com/ua/login_security/cs_us_en/kb/troubleshooting-for-multi-factor-authentication.htm

Viewing Files

1. On the left side of screen, click on File Exchange



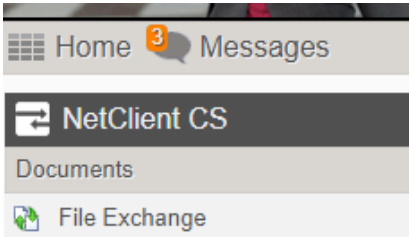
2. Click on the appropriate folder you would like to access to upload files.



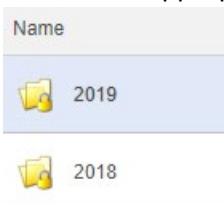
3. Click on the file you wish to view.
4. To download one or multiple files, click in the box(es) to the left of the file(s) you wish to download.
5. Click on Download Selected. A Zip file with all files will appear at the bottom of your browser.

Uploading Files

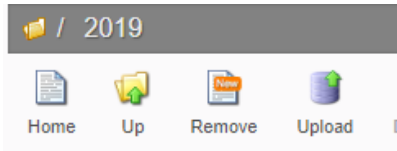
1. On the left side of screen, click on File Exchange

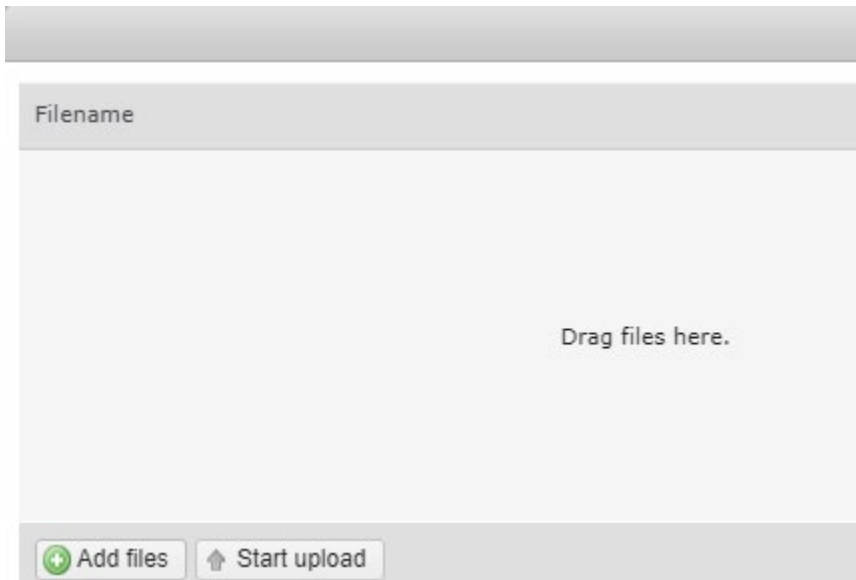


2. Click on the appropriate folder you would like to access to upload files.

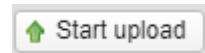


3. Click on the Upload button in the tool bar.





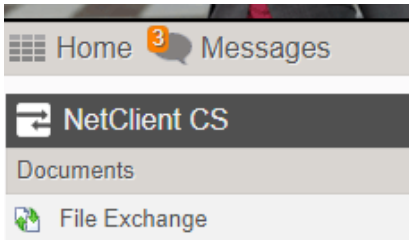
5. If using the add files feature, navigate to the file(s) you wish to upload, select the appropriate files, and click on Open.



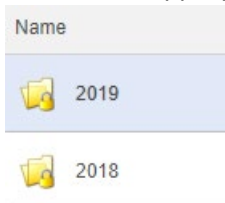
7. Once the upload is complete, your files will appear in the folder.

Download Files

1. On the left side of screen, click on File Exchange

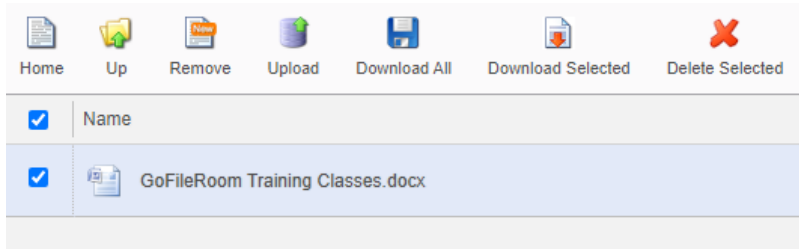


2. Click on the appropriate folder you would like to access to download files

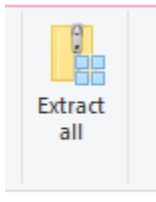


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- Click in the box to the left of the documents you want to download



- Click on the Download All icon
- A Zip file with all files will appear at the bottom of your browser.
- By default, the zip file will be saved to your PC's downloads folder. You can click on the Zip file at the bottom of your browser to open the folder.
- If you click on Extract All, you can then change the location of where you would like to save your files.



← Extract Compressed (Zipped) Folders

Select a Destination and Extract Files

Files will be extracted to this folder:

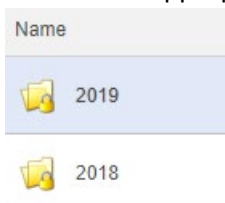
C:\Users\test\Downloads\2021

Show extracted files when complete

- Then click on Extract

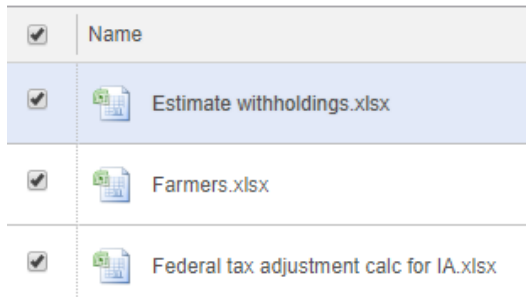
Deleting Files

- Click on the appropriate folder you would like to access to upload files.



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2. Click in the box to the left of the file you wish to delete. You can select all files by clicking the box at the top next to Name.

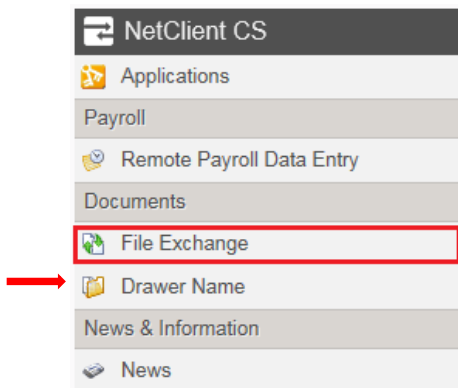


3. Click on Delete Selected in the tool bar.

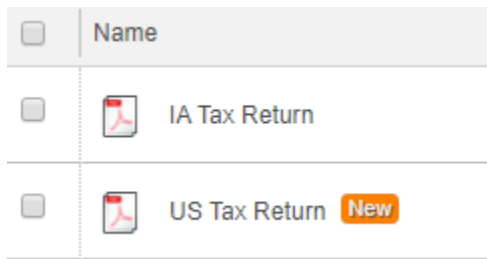
Viewing Tax Returns

Tax returns are printed to a different location in the documents section. These will not appear in the File Exchange area. To locate your tax return, follow the steps below.

1. Click on the Drawer that shows your Name or entity name*.



2. Click on the Tax Returns folder.
3. Click on the appropriate year/date.



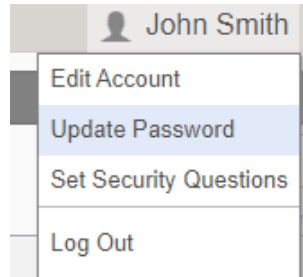
5. To view your return, click on the name of the tax return.
6. Your return will open a new window within your internet browser.

* If you have multiple entities linked to your account, you will see each entity listed separately in the documents section

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Editing User information

1. Click on your name in the top right corner of the browser



2. Edit Account allows you to edit your name, login and email address.
3. Security Questions can be set to help you with password recovery in the instance that you forgot your login password.

FAQs

https://cs.thomsonreuters.com/ua/netfirm/nc_user_cs_us_en/file_exchange/fe_faqs.htm