



Client Portal Help Guide



eder, casella & co
certified public accountants

www.edercasella.com

Frequently Asked Questions

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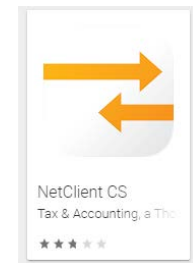
How do I access the client portal?

The Client Portal can be accessed through our website:
www.edercasella.com

The Client Portal can also be accessed directly at :
<http://267079.netlinksolution.com>

Please note that Internet Explorer is the best browser to use when accessing the Portal. Although Google Chrome can also be used, Internet Explorer seems to work the best with the Portal.

When accessing the Portal through a browser on a phone or tablet, many times you are only able to see the first page. It's best to use the NetClient CS App, which can be installed from Google Play or the App Store. Once you install the App you can login as you would on your computer.



What if I forgot my username?

Please contact our office and we can provide you with your username. We cannot provide you with your password though. If you have forgotten that, please see the following page.

Phone:

- McHenry: (815) 344-1300
- Barrington: (847) 382-3366
- Gurnee: (847) 336-6455

Email:

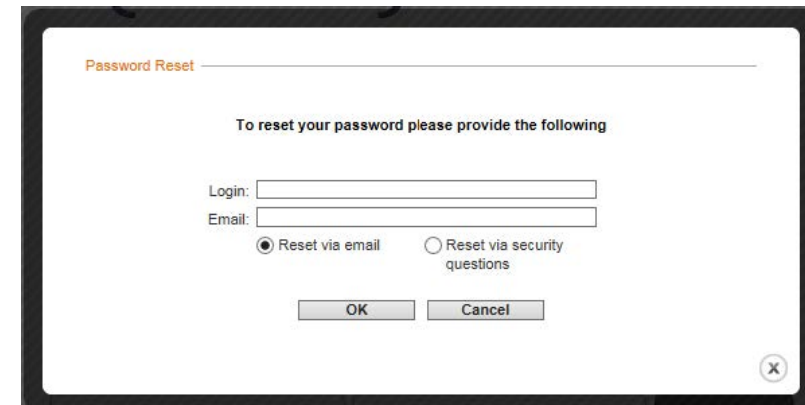
- cpas@edercasella.com

What if I forgot my password?

1. At the portal login page select the "Forgot Password" link as shown to the right. ➡



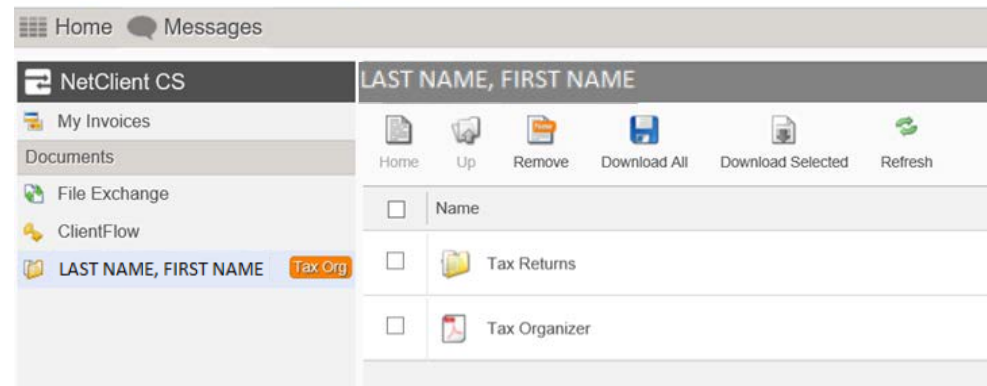
2. This will open the password reset window. Please enter your login and email to reset your password via email. You must have the correct login to be able to use this function. ➡



3. You can also reset your password with security questions that were created during the registration process.

My tax organizer is published to the portal, but I cannot find it.

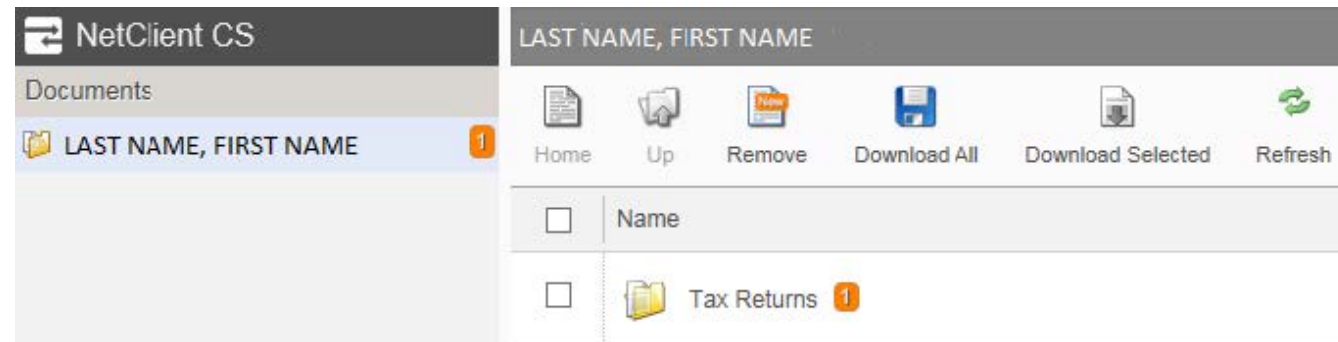
- Once you have logged into the portal, on the left hand side you will see a folder with your last name, first name. It will be located below ClientFlow (if that is included in your portal). Click on this to access your organizer. A screen shot is shown below.



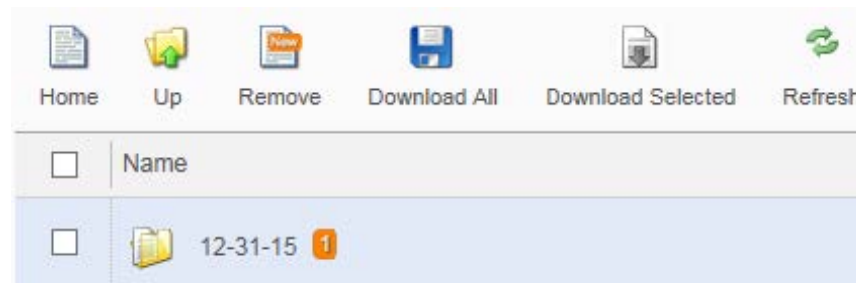
- You can now access your organizer by clicking on the "Tax Organizer" PDF.

I found my tax organizer, but where is my engagement letter?

- You will see the folder below on the right hand side. Please click on "Tax Returns".

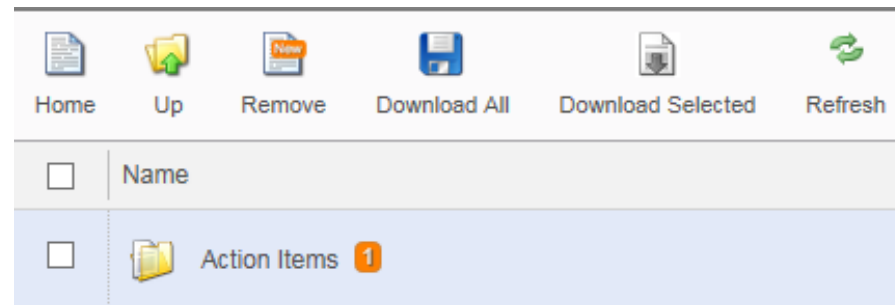


- After selecting the "Tax Returns" folder, you will find folders for each year listed by date. Please click on the current year folder.

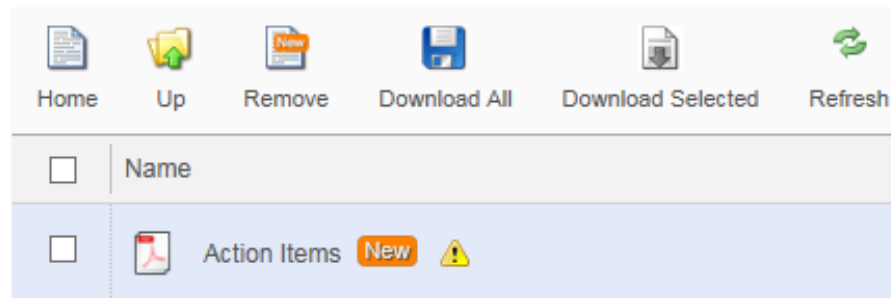


I found my tax organizer, but where is my engagement letter? (Continued)

- After selecting the current year folder, you will find a folder titled “Action Items”. Please click this folder.

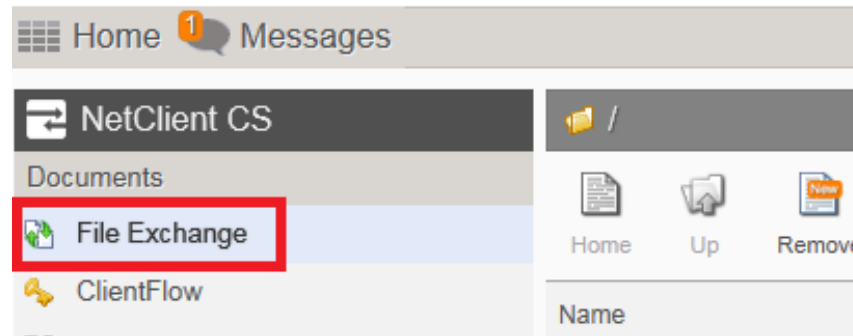


- After selecting the “Action Items” folder, you will find a PDF file titled “Action Items”. This file includes your engagement letter. Simply click the file to open the PDF.

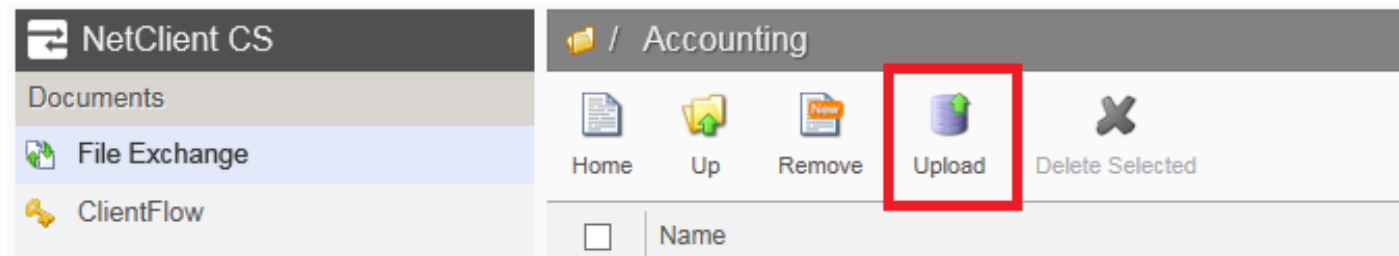


How do I upload documents to the portal?

- After logging into the portal, select the File Exchange option from the menu on the left hand side. Below is a screen shot – if you do not see the File Exchange option, please contact our office.

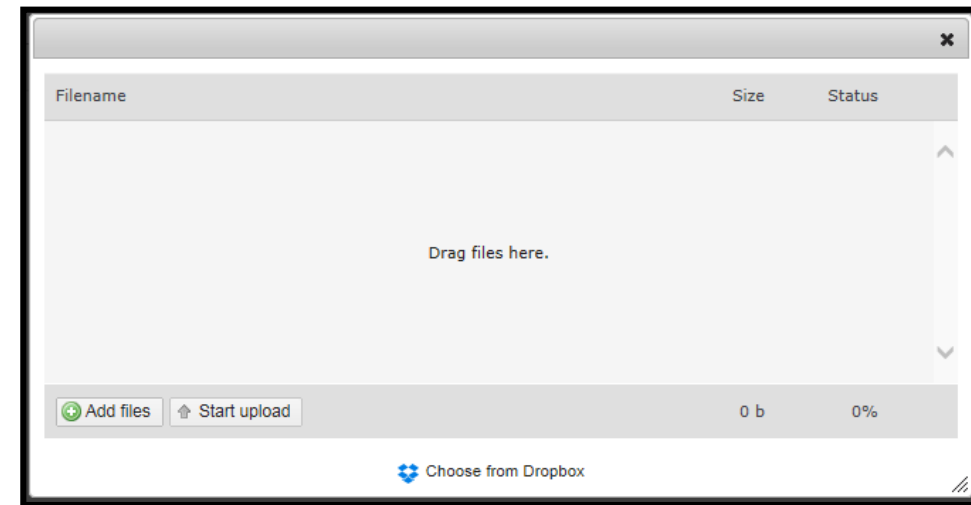


- After selecting File Exchange, select any of the folders listed to upload the information. After selecting the appropriate folder, select upload from the menu - a screen shot is shown below.



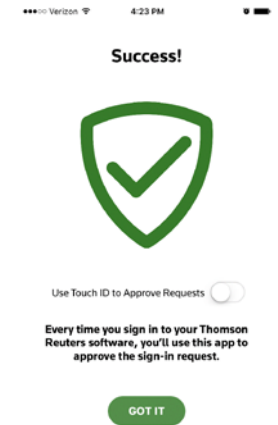
How do I upload documents to the portal? (continued)

- After selecting the “Upload” icon, the window to the right will open.
- Select “Add Files” in the lower left hand corner. Browse to find the location of your files to be uploaded and select “Open”. After selecting the files to upload, they will appear in the window to the right.
- Click “Start Upload”. When the files are finished uploading the window to the right will close.
- After the files are uploaded, do not remove the files from “File Exchange” as this will prevent us from retrieving the files. We are notified every time a file is uploaded.



I have a new phone and can't get into the portal because of multi-factor authentication.

- If you have multi-factor authentication set up to get a notification on your phone before being allowed to fully access the Portal, you won't get the notice on a new phone. It's best to turn off the multi-factor authentication before you get the new phone and then go in and set it up with the new phone.
- If you already purchased a new phone and can't get into the portal due to the multifactor authentication, please contact us for a one time access code to be able to get into your account.
- Once you are into your account you can add a new phone by clicking on your name on the top right hand side of the page. Then click on *Manage Multi-factor Authentication*.





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