



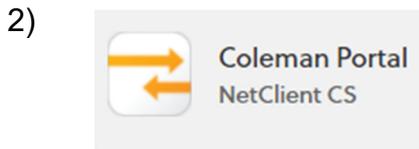
# Coleman & Associates

Fully Integrated Tax, Accounting & Financial Services

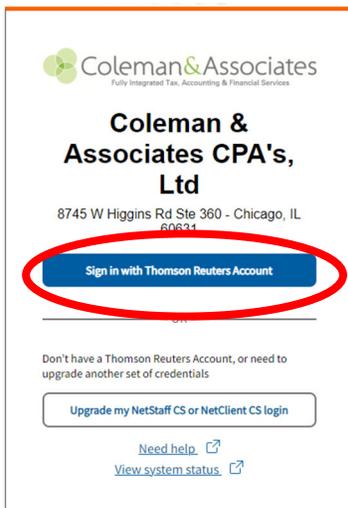
## How to use your Coleman Portal

**NOTE – You must update your Coleman Portal for the new sign on experience before proceeding. See separate instructions “Updating Your Coleman Portal – New Sign On Experience” <https://www.colemancpas.com/resources/forms-documents-and-links>**

Log in to your portal via the Client Center on our website [www.colemancpas.com](http://www.colemancpas.com)



3) Select 'Sign in with Thomson Reuter's Account'





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## 4) Enter your email address & password

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THOMSON REUTERS®  
Sign in to NetStaff CS or NetClient CS

THOMSON REUTERS®  
Sign in to NetStaff CS or NetClient CS

Email

Sign in

patti@colemancpas.com Edit

Password

Reset your password

Sign in

Forgot your password? Select 'Reset your password'

## 5) Enter the 6-digit code that was sent to your chosen Multi-Factor Authentication method here (text or authenticator app)

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THOMSON REUTERS®

Verify Your Identity

We've sent a text message to:

Enter the 6-digit code

Continue

Didn't receive a code? [Resend](#) or [get a call](#)

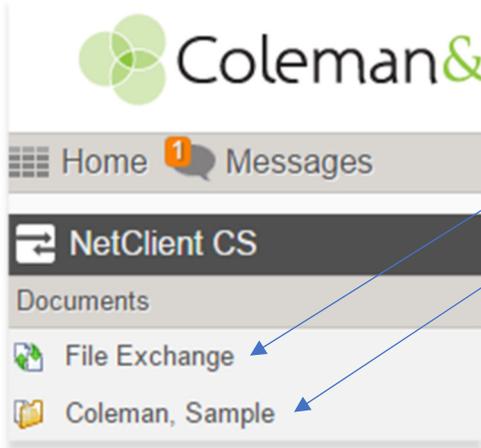
[Try another method](#)



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## **Once you are logged in**



File Exchange and your Document folders can be found on the left side of your portal.

Use File Exchange to [send](#) and [receive](#) files securely.

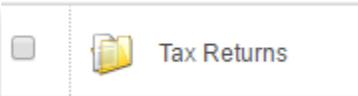
Click on your folders to view copies of your tax returns and other documents.

## **Document folders – How to view documents**

Click on the folder with your name on it (or the name of your business)

 Coleman, Sample

There you will find a folder called 'Tax Returns'



Inside you will find additional folders for each tax year which contain copies of your completed tax returns, extensions, and K-1's if applicable. Do not submit these returns. You can view, save, and print your documents.

## **File Exchange – How to upload/download documents**

### **How to send files via File Exchange –**

Click on File Exchange on the left

 File Exchange

Click on the folder with your name on it

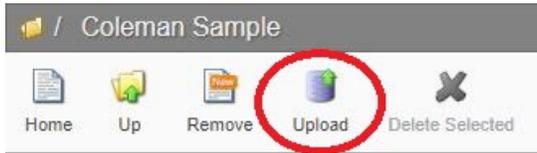
 Coleman Sample

To send files, choose the Upload button.



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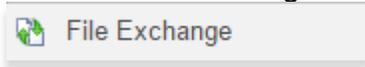
A new window will appear. Drag your files or choose the Add files in the bottom left corner of the window to browse to your files. After you have added all of your files, click Start upload once to send the files to Coleman.



We will receive an automatic notification of your uploaded document(s).

## ***How to view or download files from File Exchange –***

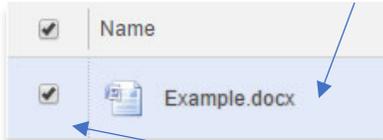
Click on File Exchange on the left



Click on the folder with your name on it



To view individual files, click on the document name

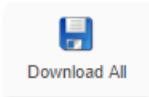


To download individual files, check the box to the left of the file(s)

Then choose 'Download Selected'



Alternatively, to download all of the files, simply choose 'Download All'



A new window will pop up asking where you would like to save the file(s).