Portal User Guide

1. **Accessing your Secure Portal & Logging In** ~ 3 ways to log in
    If you have forgotten your username & password or have any trouble logging in, please call the office to have that information reset for you.

    ...**NetClient CS -** App on your smartphone

    NEW!!!!

    ... **www.wagner-cpa.com** website –
    Click "Client Center" then "Client Login"

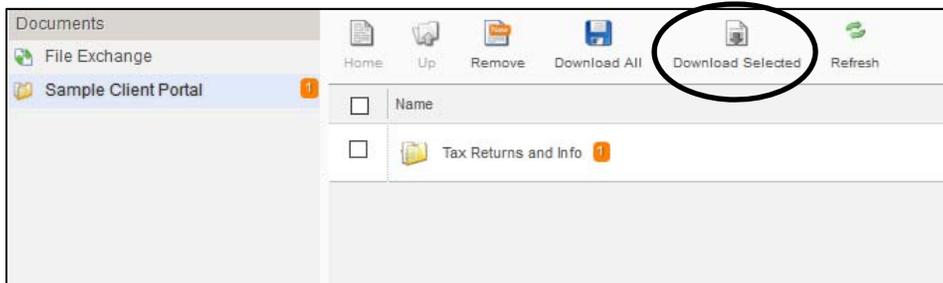   ... **Type Website Link to NetClient CS into your web browser**
    (https://secure.netlinksolution.com/nextgen#/?ref=email&msgid=47708072)
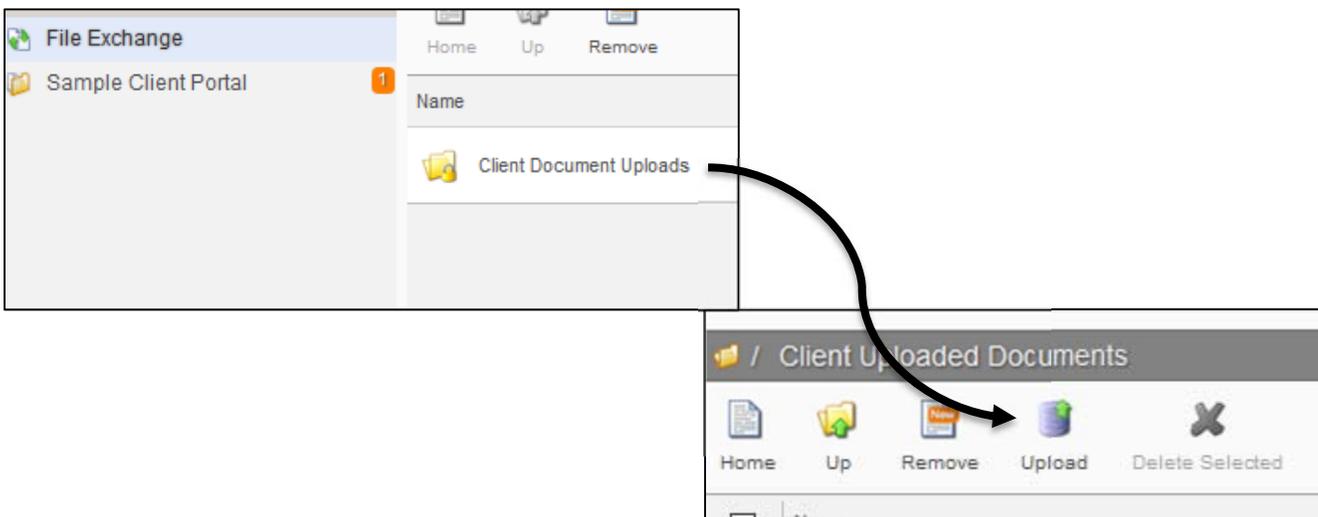
2. Viewing documents

    a. Click the folder with your name located in the top left corner, then click through the files. If desired, you can download files to your computer's hard drive.

3. Uploading documents

    a. Click on File Exchange in the top left, then double-click the file "Client Document Uploads", then Upload. Follow the promps for adding your files.

    b. If using the mobile app, you can take a picture of the document to be uploaded.

4. Paying Your Invoice

    a. Click on My Invoices in the top left, select the checkbox of the invoice you would like to pay, then click Pay Selected in the bottom right hand corner

    b. If you using the mobile app, you can only view the invoice. You must visit the website to pay your invoice.