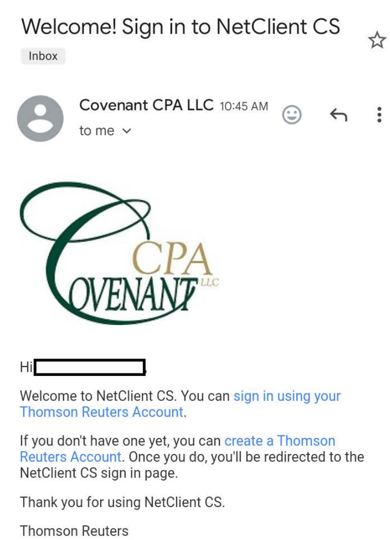
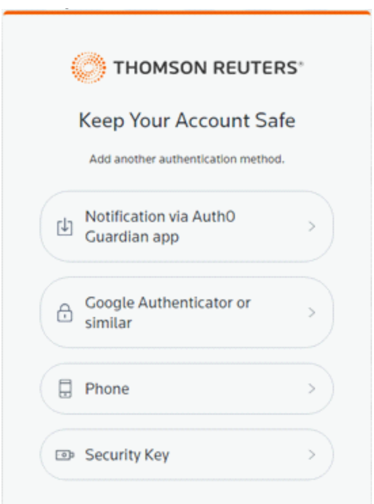
New Portal User Guide

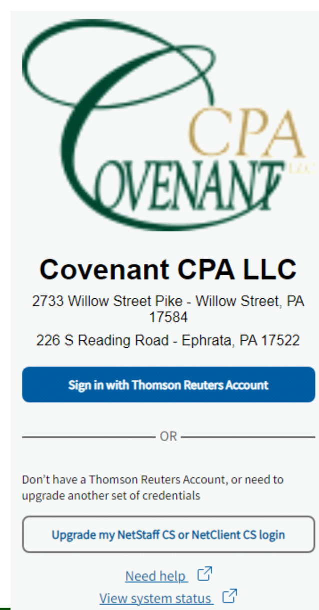
If you would like the benefits of using a portal, give us a call and we will set one up for you! Then follow these instructions.

- You will receive an email that says "Welcome! Sign in to NetClient CS." Click the "Create a Thomson Reuters Account" link.
- Your name and email will be filled in. Create a password for your account. Follow the password specifications listed. Check "I agree to terms of use". Click Continue.
- A 5 digit code will be emailed to you to confirm. Type in the code and click "Create Account".
- It will bring you back to the sign in screen. Sign in using your email and password you just created.
- You will be prompted to set up a verification method. Choose whichever you prefer.





- If you choose phone, that gives you the option of receiving a 6 digit code via text message or phone call.
- If you choose to use the Auth0 Guardian App, for an android phone you can download it [here] or for an iphone phone download it [here]. With the app open on your phone, scan the QR code on the screen.
- After you set up your two factor authentication it will give you a recovery code. Keep this in a safe place. Check "I have safely recorded this code". If your regular two factor authentication option isn't handy, you could use this code. Your email address is also automatically set up as a backup option.
- You are in! You will also receive an email confirmation that says Successfully migrate NetClient CS Account. You do not need to do anything with that email. It is just confirmation.
- The next time you go on to the portal the sign in screen will look like to the right. Click "Sign in with Thomson Reuters Account" and use the email and password you just created!



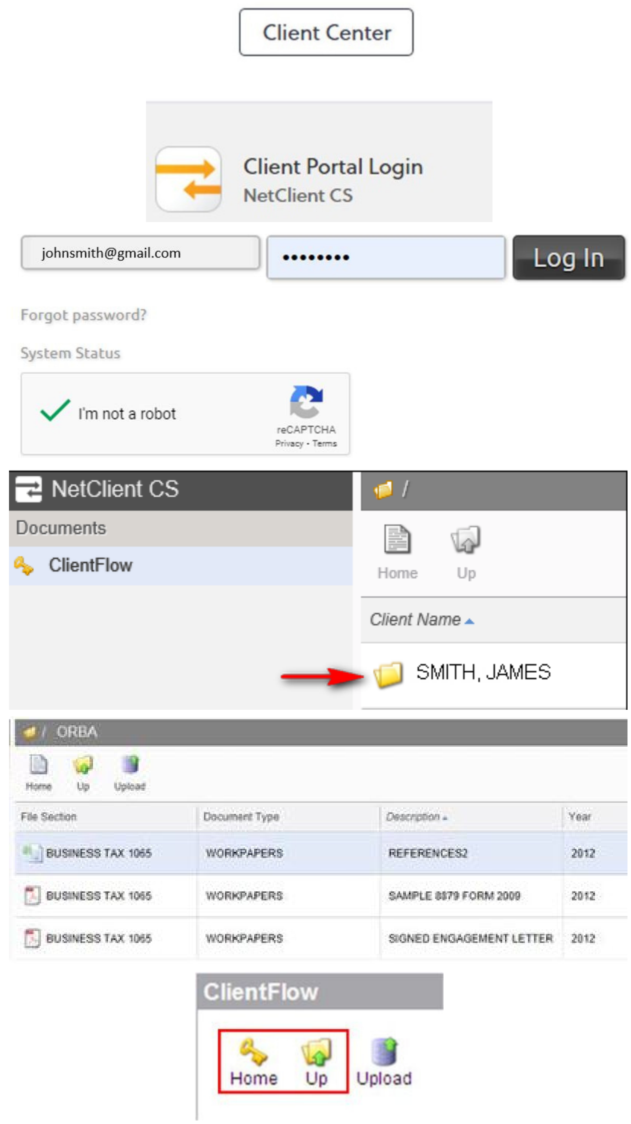
Need help? Contact us by phone at 717-464-2951 or by email at TaxPro@Covenant.CPA.
Get the NetClient mobile app. Android users click HERE. iPhone users click HERE.

Accessing Your Files

If you have been a portal user with us prior to 8/1/2022, you will now have two locations for documents: the account named folder(s) on the menu bar, which is referred to as File Exchange, and the new ClientFlow button on the left menu bar.

ClientFlow, which is located inside your already established Portal, interacts directly with our firm's document management system, which allows for a fast and convenient exchange of documents and information between you and our firm.

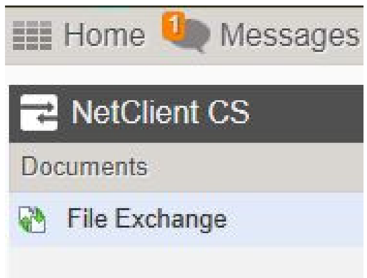
- **PC:** Log into your portal from the client center of our homepage at www.Covenant.CPA. **App:** Log in to the NetClient app on your mobile device.
- **PC & App:** All tax returns will be located in the File Exchange folder which contains your name on the left side menu bar underneath the Document section. All other documents added or requested to be on your portal will be located in the ClientFlow folder on the left side.
- **PC & App:** Click on the name of the client folder you want to enter. If you only have one account, you will only see one folder. If you have business or other family connected to your portal, you will see all the available accounts here.
- **PC & App:** Click on the document you want to open. If you have a lot of documents, you can enter a search term in the "Find" field to locate your document faster. Depending on your browser, the PDF file will either start to download immediately or will open to preview where you can then print or download directly.
- **PC:** Click the "Up" button to return to your previous screen or "Home" to go back to your main page in ClientFlow. **App:** Click the back button on your phone to go backwards or click on the menu bar in the upper left corner.

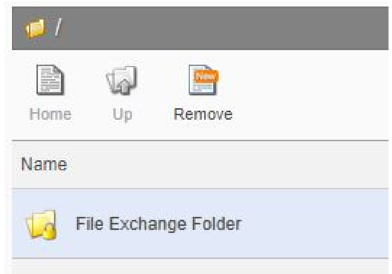


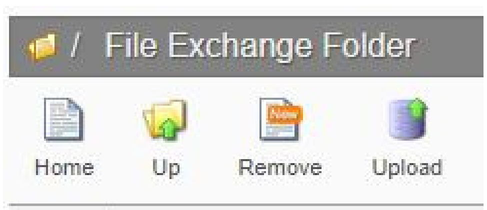
Forgot your Password? Click on the Forgot password? button underneath the login. If you get a warning that you are locked out from trying the wrong password too many times, you will be locked out for 24 hours and will need to wait 24 hours before trying "Forgot password?" on the site. There is no way to release your lock early.

Uploading Files Using File Exchange

- **PC:** To send a document to your accountant, click on "File Exchange" on the left side under Documents. Select the "File Exchange Folder" in the center of the screen, then select "Upload". You can now hit "Add files" to select your pre-saved documents to attach. Be sure to hit "Start Upload" once you have added the files and then finish with the "Upload" button for them to send to your accountant. **App:** Click on the "+" sign in the upper right, select the file and upload.

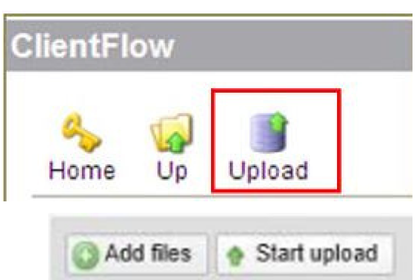






Uploading Files Using ClientFlow

- **PC:** To send a document to your accountant, click on the "Upload" button, then "Add files". Find the files and select "Upload". **App:** Click on the "+" sign in the upper right, select the file and upload.



Paying Your Invoice

When an invoice is added to your portal, you will receive an email with a link to view the invoice on your portal. You can only pay with credit card through the portal. If you prefer to pay via ACH (electronic check), you can do so on our website by selecting "Pay Bill" on the homepage. You will need to know your invoice number, client ID and payment amount from the invoice to make your payment on our website.

- **PC:** Click on "Invoices" on the top left. Mark the checkbox in the pay column of the invoice you wish to pay. Click the "Pay Selected" button. You will need to re-enter your password and then fill in your payment information and click "Submit Payment". You will receive a receipt in your email.
- **App:** Click on "My Invoices" on the top left. In the Open invoice section, click on the invoice you wish to pay. Enter your credit card information and "Submit". You will receive a receipt in your email.