



NetClient CS

Client Portal User Guide

Private, Secure and Accessible Document Sharing

Contents

Introduction	1
System requirements for the client portal	1
Getting Started with the Client Portal.....	2
Activating your client portal account.....	2
Logging into your client portal account	4
Additional login and password information	5
Navigating in the client portal	5
Managing Documents in the Client Portal.....	6
Viewing client portal documents	6
Uploading documents to the client portal	8
Additional upload information	9
Accessing Your Client Portal from Mobile Devices.....	10
Mobile app for client portal access on the go	10
Frequently Asked Questions	12
Appendix A: Our Contact Information	13



Introduction

Think of the client portal as an extension of our website, through which we can securely and quickly exchange electronic documents with you and to which you can upload electronic documents to the firm.

Unlike email messages and their attachments, the client portal uses encryption technology to ensure that your information is secure. Also, sharing documents electronically is good for the environment because it doesn't require the use of resources that are needed to produce and transport printed documents. Finally, the client portal facilitates continued access to your important tax documents, such as tax returns and financial statements.

System requirements for the client portal

You must have a high-speed internet connection to use the client portal. The portal is compatible with the following internet browsers.

- Google Chrome™
- Microsoft® Internet Explorer® version 7.0 or higher
- Mozilla® Firefox® version 3.0 or higher
- Apple® Safari® version 5.0 or higher

There is also a mobile app for accessing your client portal documents on Apple® and Android® mobile devices.



Getting Started with the Client Portal

In this chapter, you will learn how to register your client portal account, how to log in to the client portal, and how to access key features of the portal.

Below, we have provided step-by-step instructions and images to walk you through some of the enabled features. Please note that these images are examples, and depending on the features we enabled for you, your portal may look slightly different.

Activating your client portal account

After we create your personal client portal account, you will receive an activation email message from Miller Giangrande LLP. The message will contain a link through which you can create a login and password for your client portal.

Important! If you do not receive an activation email message, please be sure to check your spam folder. If you still don't see an activation email message, please contact Andrea Becher at 714) 494-2200 or info@mngcpa.com

Follow these simple steps to activate your client portal account.

1. In the activation email message, click the registration link to create your login and register your account.
2. On the client portal registration screen (illustrated below), enter a login in the **Choose Login** field.

Tip: Use your email address as your login to make it easier to remember.

Welcome

Please register your account.

Choose Login

Choose Password

Confirm Password

Register

3. Enter a password in the **Choose Password** field.

Notes:

- Passwords must contain at least eight characters, they must include both upper and lower case letters and at least one number.
 - Passwords must contain symbols, such as %, \$, and #.
 - Passwords are case sensitive.
-

4. Re-enter the password in the **Confirm Password** field.

5. Click Register.

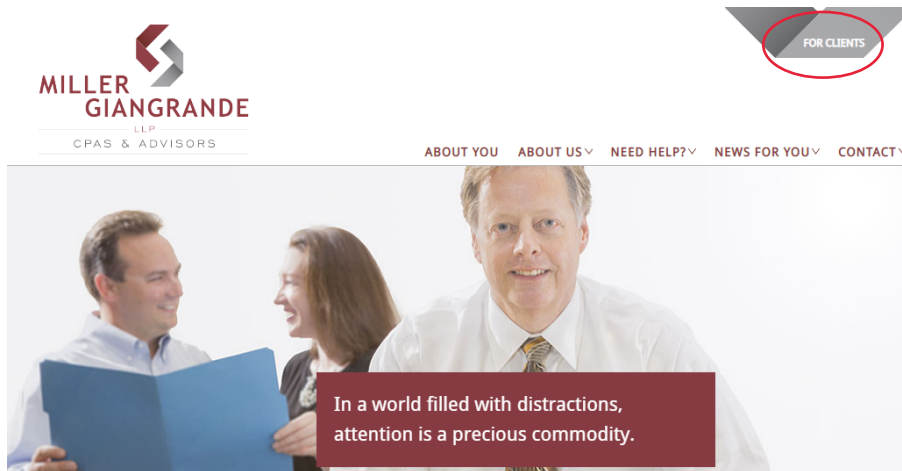
Notes:

- If you have questions or if you have difficulty accessing your client portal account, please contact Andrea Becher or info@mngcpa.com
 - After you register your account, you can log in to the client portal from our website www.mngcpa.com. You can also bookmark the client portal login screen in your browser.
 - We encourage you to set up the security questions on your client portal account which helps you obtain access if you forget your password. You will automatically be prompted to set up your security questions when you first login to your portal account and the system will guide you through the process.
-

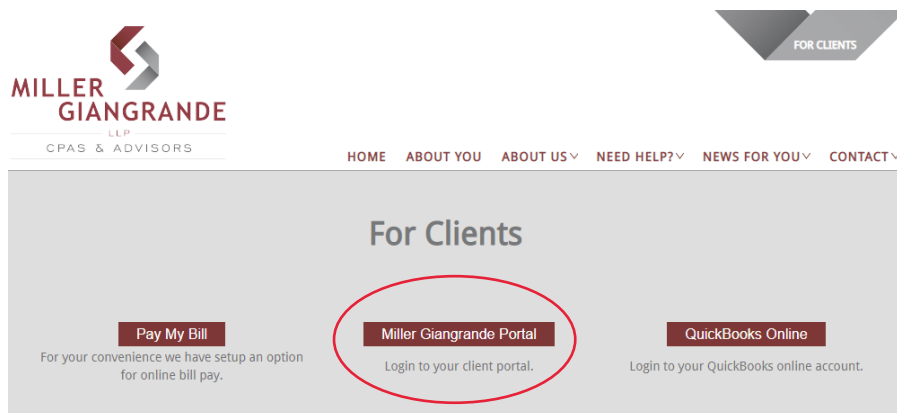
Logging into your client portal account

Once you have registered your portal account, you can log into your client portal from our website, www.mngcpa.com. Follow these steps to login to your client portal.

1. Click the **"For Clients"** link in the top right corner of our homepage.



2. On the page that follows, click on the **"Miller Giangrande Portal"** link that directs you to the Client Portal login page.



3. Enter your **Login** and **Password** on the portal gateway page (illustrated below) and select **Log In**.

Miller
GIANGRANDE
LLP
CPAS & ADVISORS

Please log in.

Login Password Log In

Additional login and password information

- If you forget your password, you can reset it by answering a series of security questions that you can set up after you activate your account. To set up security questions, click your name at the top right of the client portal screen.
- If you don't remember your password, click the **Forgot Password?** in the login screen to have us send you a temporary password via email or to reset your password by answering the security questions (if you set them up).
- If anyone makes ten consecutive attempts to log in to a client portal account using an incorrect password, the client portal will disable the login for the portal. The client portal will also send an email message to the email address that is assigned to the login; the email message notifies the user of the unsuccessful login attempts, and provides a link to enable the login. The client portal will enable the login after 30 minutes or when the user clicks the link in the email message.

Navigating in the client portal

The client portal provides quick access to all of the features you need to view and manage your electronic documents.

The screenshot shows the Miller Giangrande LLP Client Portal interface. The header includes the firm's logo, name, and address. The main navigation bar has links for Home, Messages, and a user profile. The left sidebar shows a list of folders, with 'ClientFlow' selected. The main content area displays a table of client information.

Annotations:

- An arrow points from the text "Click on a folder to view its contents. You may have more than one folder." to the 'ClientFlow' folder in the left sidebar.
- An arrow points from the text "View messages received in your client portal" to the 'Messages' link in the top navigation bar.
- An arrow points from the text "Update your login, email address, and security questions in the account section. This is also where you log out of the portal." to the user profile 'Chris and Andrea Becher' in the top right corner.

Client Name	Client Number
BECHER, CHRISTOPHER D. & ANDREA J.	FFMBB03
BECHER, MARK R. & JOANA F.	FFMBB02

Managing Documents in the Client Portal

This chapter describes how to manage portal documents, including how to complete your online web tax organizer.

Viewing client portal documents

After registering your client portal account, you can view the documents we placed in your personal client portal account for you.

1. Log in to the client portal through the link on our website, www.mngcpa.com
2. Click a folder to view its contents.



MILLER GIANGRANDE LLP
CPAS & ADVISORS

Miller Giangrande LLP
915 W. Imperial Hwy, Ste 110 - Brea, CA 92821
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Home Messages Chris and Andrea Becher Help

NetClient CS

Documents

ClientFlow

Find:

Showing 2 of 2

Client Name	Client Number
BECHER, CHRISTOPHER D. & ANDREA J.	FFMBB03
BECHER, MARK R. & JOANA F.	FFMBB02

Notes

- Certain columns such as “Document Type” and “Description” in the Client Portal contain values that we assign to each document for easy organization and quick access within our document management system. To resize a column, click and drag its border. Click a column heading to sort the documents in the list by the information in that column.
- The Client Portal is empty if we have not published any documents to your personal portal account, and if you have not uploaded any documents recently.

3. Click a document to view it.


BECHER, CHRISTOPHER ...

Home Up Upload Find:

Showing 3 of 3

File Section	Document Type	Description	Year	Period End	Document Date
CLIENTFLOW	UPLOADED DOCUMENTS	ABB INCOMING WIRE INSTRUCTIONS PDF			07/26/2022
INDIVIDUAL TAX 1040	TAX RETURN	CA TAX RETURN	2021	12/31	02/01/2022
INDIVIDUAL TAX 1040	TAX RETURN	US TAX RETURN	2021	12/31	02/01/2022

Notes:

- Because documents in the Client Portal are read only, you cannot edit them. If you need to edit a document, save a copy of it to your local drive by choosing File > Save As (or by clicking the Save  button in the Acrobat toolbar), edit the document, and then upload it to NetClient CS as described in “Uploading documents to ClientFlow” on page 8.
- You can view documents only if the software applications in which the documents were created are installed on your computer. For example, to view a DOC or a DOCX file, Microsoft Word must be installed on your computer.

4. After closing the document, click the Up icon to return to home page of your client portal.

BECHER, CHRISTOPHER ...


Home Up Upload Find:

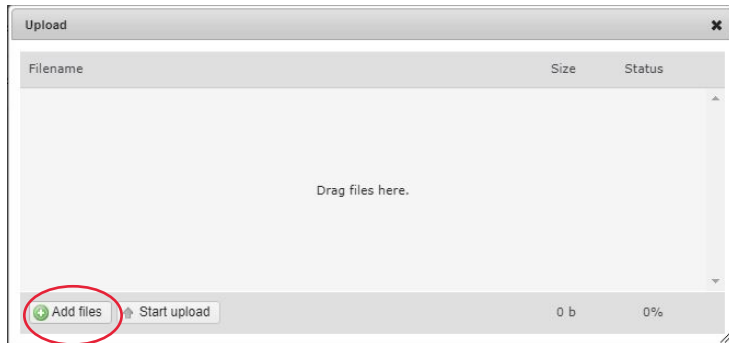
Showing 3 of 3

File Section	Document Type	Description	Year	Period End	Document Date
CLIENTFLOW	UPLOADED DOCUMENTS	ABB INCOMING WIRE INSTRUCTIONS PDF			07/26/2022
INDIVIDUAL TAX 1040	TAX RETURN	CA TAX RETURN	2021	12/31	02/01/2022
INDIVIDUAL TAX 1040	TAX RETURN	US TAX RETURN	2021	12/31	02/01/2022

Uploading documents to the client portal

Follow these steps to upload documents to the client portal.

1. Click the folder to which you will upload documents.
2. Click the **Upload**  icon and then click the **Add files** button.



Tip: Click the X in the top right corner to cancel the upload.

3. Navigate to the document(s) you want to upload, select the document(s), and click **Open**.
4. Click the **Start Upload** button below the selected files. An email notification will be sent to Miller Giangrande LLP.



Note: When your documents are visible in your Client Portal, the upload was successful and Miller Giangrande LLP can now view the documents.

Additional upload information

- You can upload files of any type to the Client Portal. Note that TIFF files are converted to PDF files during upload.
- You can upload files of up to 1 gigabyte (GB).
- Your Client Portal session may time out if your internet connection is not fast enough to complete a single upload within three hours.
- You can upload multiple documents or files to ClientFlow simultaneously.
- **Miller Giangrande LLP removes documents in your portal from time to time to clear out documents no longer required and to keep the portal easy to navigate.** Please ensure that you make copies of documents in the portal if you would like to ensure that you always have them on file. Tax returns and financial statements will remain accessible in your portal account and will not be removed.



Accessing Your Client Portal from Mobile Devices

This chapter describes how to access the client portal from your mobile devices via the **NetClient CS** app.



Mobile app for client portal access on the go

Many of the same features available to you via your online client portal are also available on your mobile device with the NetClient CS mobile app.

Available as a free download to Apple® or Android™ devices, the mobile app offers you on-the-go access to your client portal. With the client portal app, you'll have access to the following portal features anywhere and at any time:

- **My Account** — Manage all your account details
- **ClientFlow** — Access your documents
- **Messages/Notifications** — Read important messages and receive notifications for account activity

Note: Documents can only be viewed in the mobile app. It is not possible to upload documents to your portal account from the mobile app and the tax organizer folder is not accessible via the mobile app.

Tips:

- The login and password information for the app is the same as for your online client portal.
 - If you select **Remember Me** on the login screen, the app will save your login and you will only need to insert your password upon login.
 - For an on-screen introduction to the app, there is a "Tour the App" option at the bottom of the login screen.
-

Apple Users:

To download the NetClient CS mobile app for **Apple®** devices, visit the App Store at <https://itunes.apple.com/us/app/netclient-cs/id572952397?mt=8&ign-mpt=uo%3D4> or follow the below steps.

Android Users:

To download the NetClient CS mobile app for **Android®** devices, visit the Google play store at <https://play.google.com/store/apps/details?id=com.thomsonreuters.clientes> or follow the below steps.

1. Open the App Store on your device.

2. Search for the **NetClient CS** app.



Note: The NetClient CS app is free and is offered by “Tax & Accounting, a Thomson Reuters business”. The category is Business. The software on your mobile device needs to be compatible with the app in order to download to your device. Check the Apple and Android app stores for software requirements.

3. Select **Download** to install the NetClient CS mobile app on your device.
4. Open NetClient CS, insert your **login** and **password** and click **Sign In** to access your Client Portal.

Miller Giangrande LLP
915 W. Imperial Hwy, Ste 110 - Brea, CA 92821

login
password

Secure with Face ID ☒

Sign In

[Forgot Password?](#)
[Privacy Policy](#)



Frequently Asked Questions

This chapter outlines tips and answers to commonly asked questions.

1. What is a Client Portal

A personal client portal account enables Miller Giangrande LLP and our clients to exchange electronic documents easily, safely and in real time. Using a secure username and password, clients can view information such as tax returns, financial statements and tax organizers. Clients also have the ability to securely upload documents to their personal portal account for sharing with Miller Giangrande LLP.

2. Login Tips

- Your Login ID is not case sensitive, however, your password is case sensitive
- Use your email address to make your Login ID easier to remember
- Your password cannot contain your Login ID or your first and last name
- Passwords must contain a minimum of seven characters and include both letters and numbers
- Passwords can contain symbols, such as %, \$ and #
- If you forget your password, you can reset it anytime by clicking **Forgot Password** on the portal login page
- Use of the client portal requires one of the following browsers:
 - Google Chrome (all versions)
 - Microsoft Internet Explorer (version 7.0 or higher)
 - Apple Safari (version 5.0 or higher)
 - Mozilla Firefox (version 3.0 or higher)

3. Why am I not able to receive documents from Miller Giangrande LLP within an email

Miller Giangrande LLP is committed to protecting our clients' personal and sensitive information. Unlike emails and their attachments, the client portal uses encryption technology to ensure that your information is secure. With the client portal, it is our goal to enhance client communication and speed in order to improve client service.

4. How do I know when there is something new for me in the portal

You will receive an email notification when new documents have been uploaded to your portal account. Likewise, Miller Giangrande LLP automatically receives notification when clients upload documents to their portal account.

5. How long will documents remain in the portal

Except from tax returns and financial statements, Miller Giangrande LLP removes documents in your portal from time to time to clear out documents no longer required and to keep the portal easy to navigate. Please be sure to make copies of documents in the portal if you would like to keep them on file. Tax returns and financial statements will remain accessible in your portal account and will not be removed.

6. Am I able to access my tax returns and other documents on my mobile device?

Absolutely. There is a free NetClient CS app which allows you to access your client portal account on the go. Please refer to the user guide for further information.



Appendix: Our Contact Information

Below is our portal contact information in case you need to contact us with questions about the client portal.

Firm name: Miller Giangrande LLP

Contact person: Andrea Becher

Phone: 714) 494-2200

Email address: info@mngcpa.com

Firm website: www.mngcpa.com