



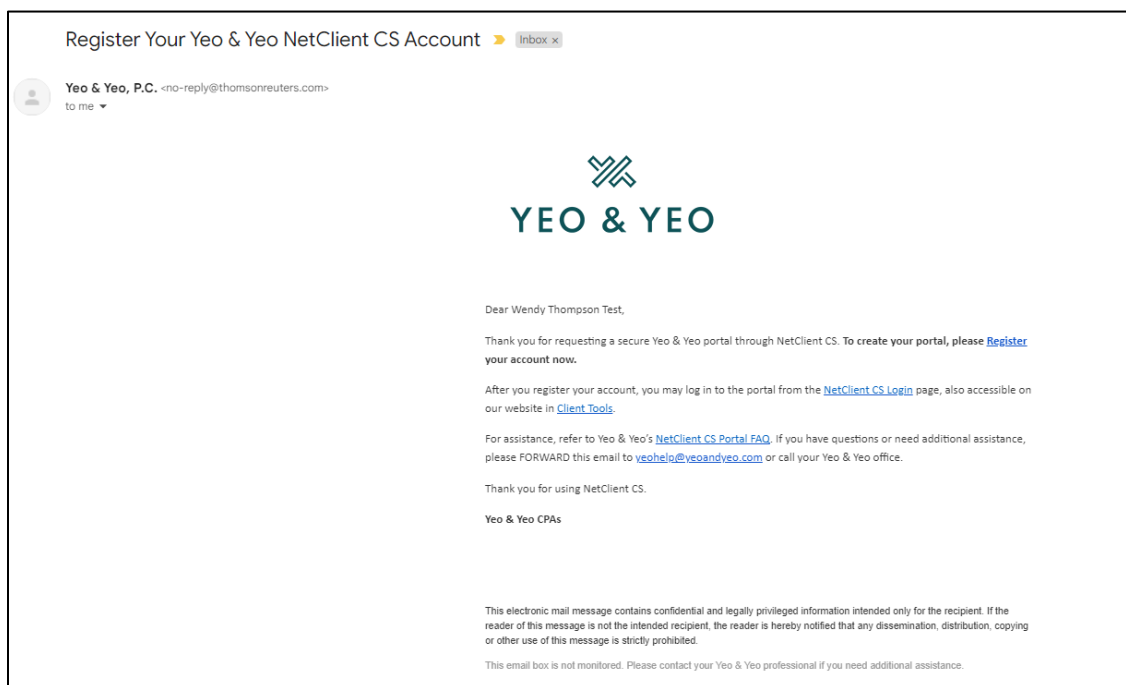
YEO & YEO

BUSINESS SUCCESS
PARTNERS

NetClient CS Client Portal FAQ

1. Welcome to Yeo & Yeo NetClient CS!

Once you have asked us to set up your account, you will receive an email asking you to create a login and password. The email will look like this:



Click '[Register](#).'

The following web page will open. Enter a password, choose your preferred language, agree to the terms, and then click 'Continue':



Create an account

Access your products with a single Thomson Reuters account.

Already have an account? [Sign in](#)

All fields are required.

First name

Last name

Email

New password

Your new password must contain:

At least 8 characters in length

At least 3 of the following:

An uppercase letter (A-Z)

A lowercase letter (a-z)

A number (0-9)

A special character (!"#\$%&'()*+,-./:;<=>?@[\\]^_`{|}~)

Confirm new password

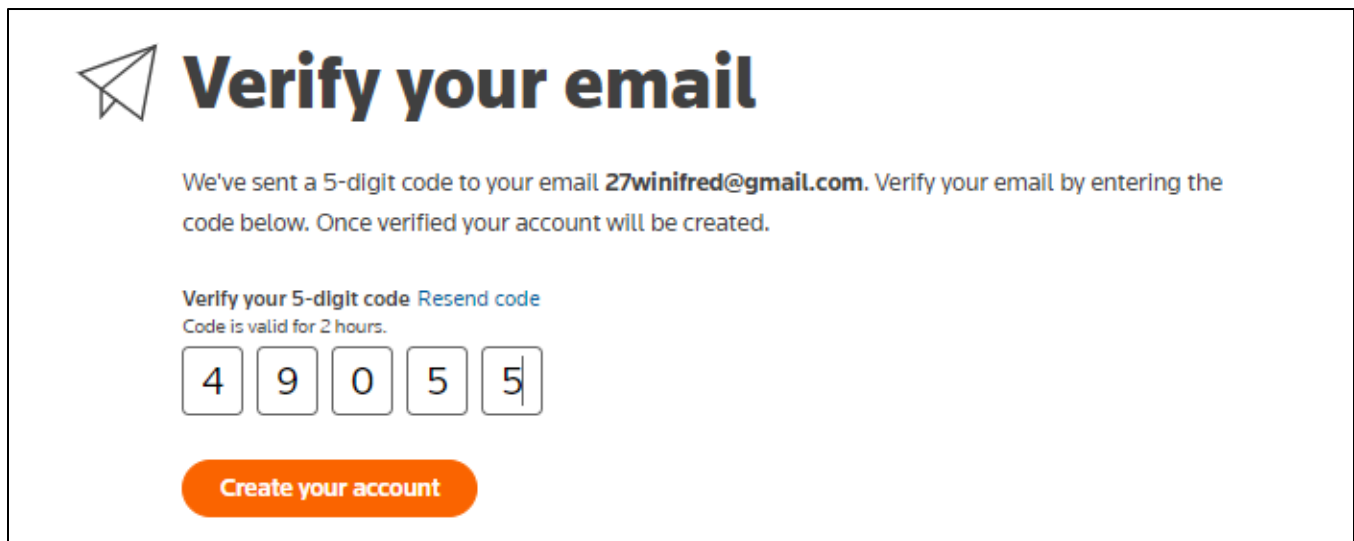
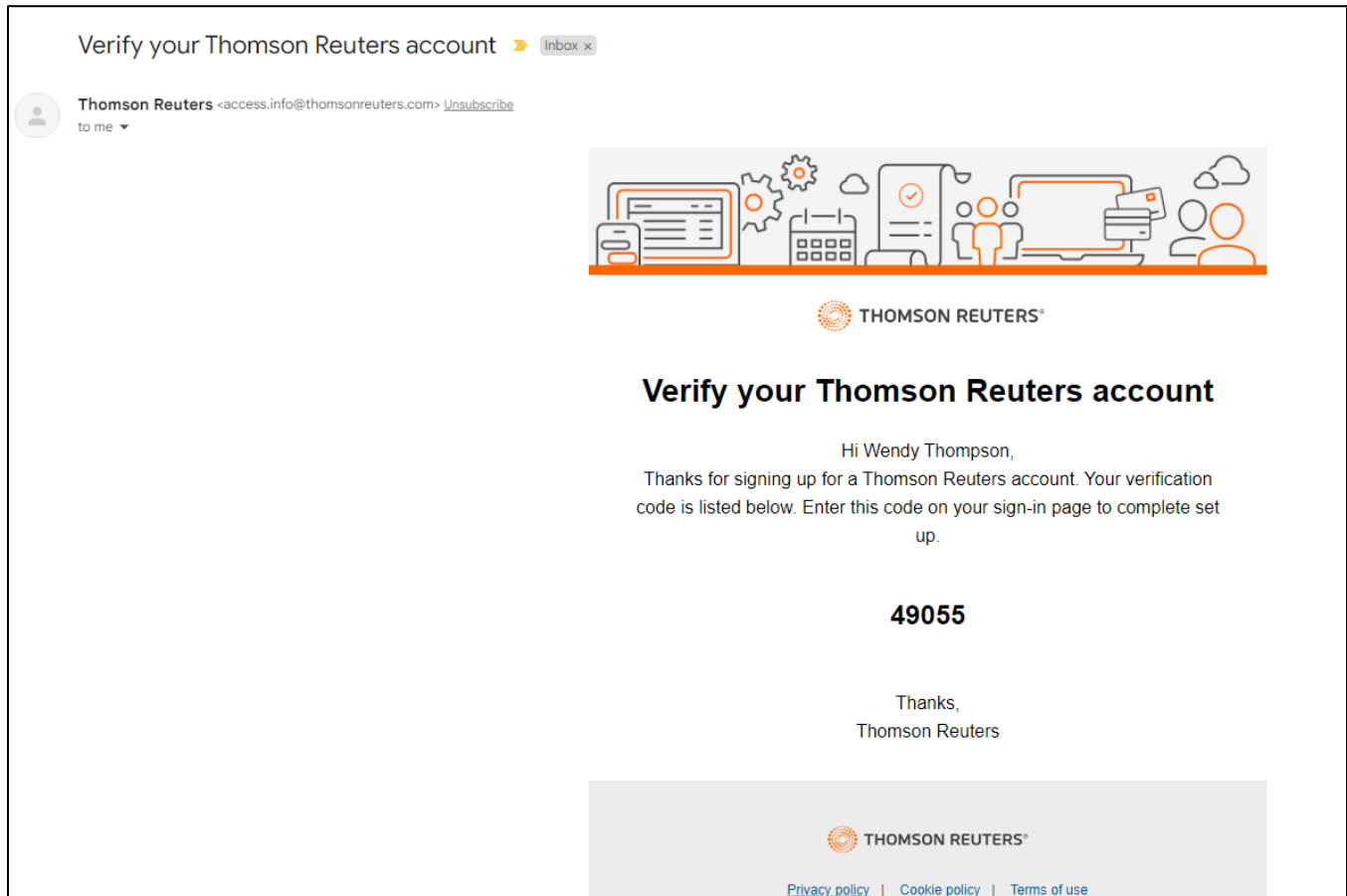
Preferred language

I agree to the [terms of use](#)

Continue



You will then be asked to verify your email with a 5-digit code that has been emailed to you.



Enter the 5-digit code. Then click 'Create your account.'



You will then be asked to log in using your email and password.

 **THOMSON REUTERS®**

Sign in to NetStaff CS or
NetClient CS

Email

[Sign in](#)

Click 'Sign in,' and then it will request your password.

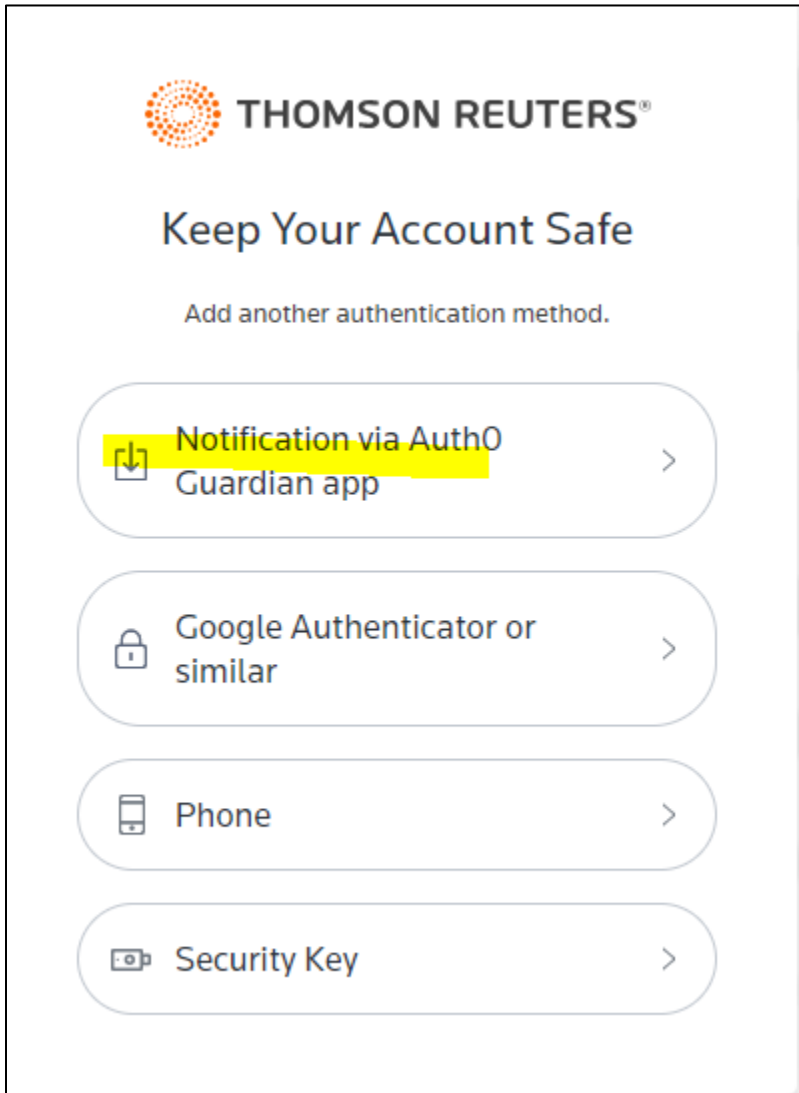


The screenshot shows the login interface for Thomson Reuters. At the top left is the Thomson Reuters logo. Below it, the text reads "Sign in to NetStaff CS or NetClient CS". There are two input fields: the first contains the email address "27winifred@gmail.com" with an "Edit" link to its right; the second is labeled "Password" and contains seven dots, with a "Show/Hide" icon (three dots in a square) and an "Eye" icon to its right. Below the password field is a link that says "Reset your password". At the bottom of the form is a large orange rounded button labeled "Sign in".

You must set up multi-factor authentication to make your account more secure. The preferred method is notification via the Auth0 Guardian app, which will push a notification to your smartphone. Other options will require you to type in the code to log in each time.




Click on 'Notification via Auth0 Guardian app.'






Download the Auth0 Guardian app from the app store and click 'Continue.'




THOMSON REUTERS®

Secure Your Account

In order to continue, install the Auth0 Guardian app via the app store from your mobile device.



App Store



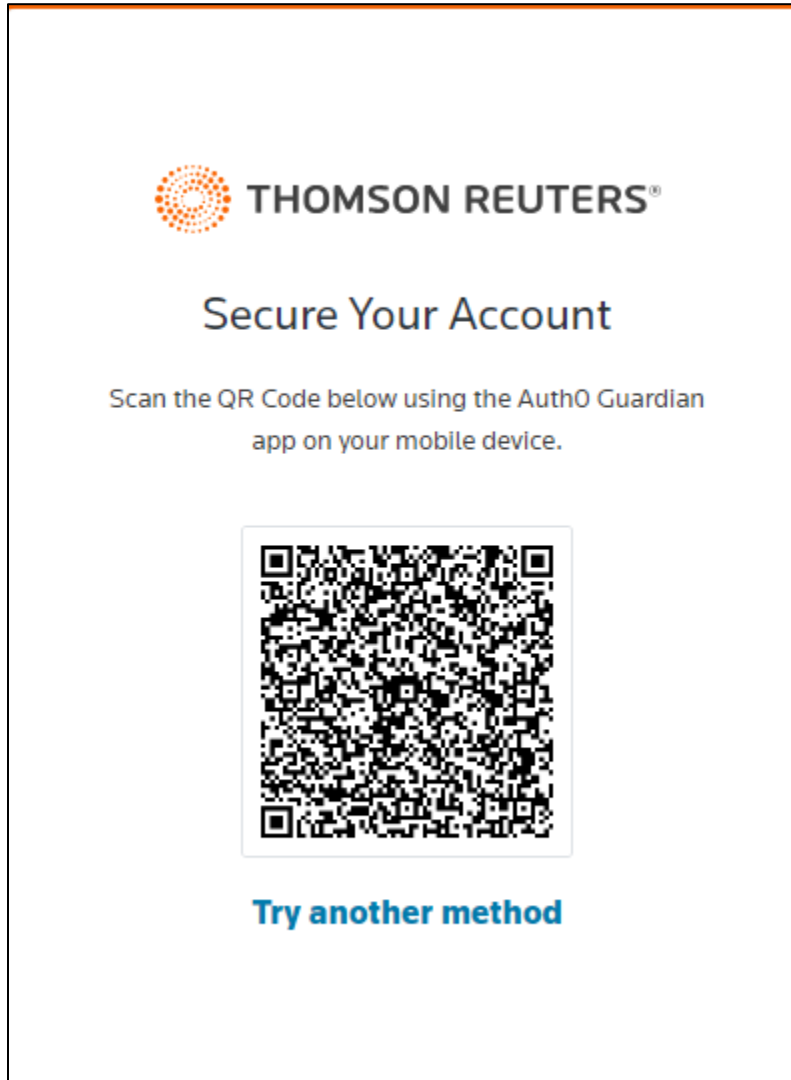
Google Play

[Continue](#)

[Try another method](#)



Open the app on your phone, click 'Add' if needed, and then scan the QR code from your screen.

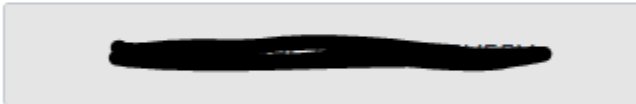


Click to copy code: You may save this code in a secure location to allow you to enter the portal when you cannot access your device. Then click, 'I have safely recorded this code,' and 'Continue.'



Almost There!

Copy this recovery code and keep it somewhere safe.
You'll need it if you ever need to log in without your
device.



Copy code



I have safely recorded this code

Continue



You will be asked to agree to the client portal agreement terms and conditions:

Updated: 5/8/2019 3:07 PM

This Client Portal Agreement ("Agreement") is made by and between Yeo & Yeo, P.C., Certified Public Accountants ("Firm") and you the "Client" effective on the date it is executed by Firm's authorized representative.

- 1. Purpose.** Firm offers a Client Portal to permit easy and secure electronic transfer of documents between Client and Firm and to provide Client with internet access to certain documents created or maintained by Firm. Firm agrees to provide the Client Portal and Client agrees to use the Client Portal on the terms and conditions set forth in this Agreement.
- 2. Service Availability.** Firm will use its commercially reasonable efforts to provide Client with continuous access to the Client Portal. FIRM MAKES NO WARRANTY, EXPRESS OR IMPLIED, THAT CONTINUOUS ACCESS TO THE CLIENT PORTAL WILL BE AVAILABLE AND FIRM SHALL NEVER BE LIABLE FOR ANY DAMAGES, INCLUDING CONSEQUENTIAL DAMAGES, ARISING FROM FAILURE OF ACCESS FOR ANY REASON, INCLUDING BUT NOT LIMITED TO THE NEGLIGENCE OF FIRM.
- 3. Security.** Firm will use its commercially reasonable efforts to make the Client Portal secure from unauthorized access. The Client Portal will require industry standard 128bit encryption on all communications between the Client's end user device and the

By clicking on 'I Agree', you indicate that you agree to these Terms and Conditions.

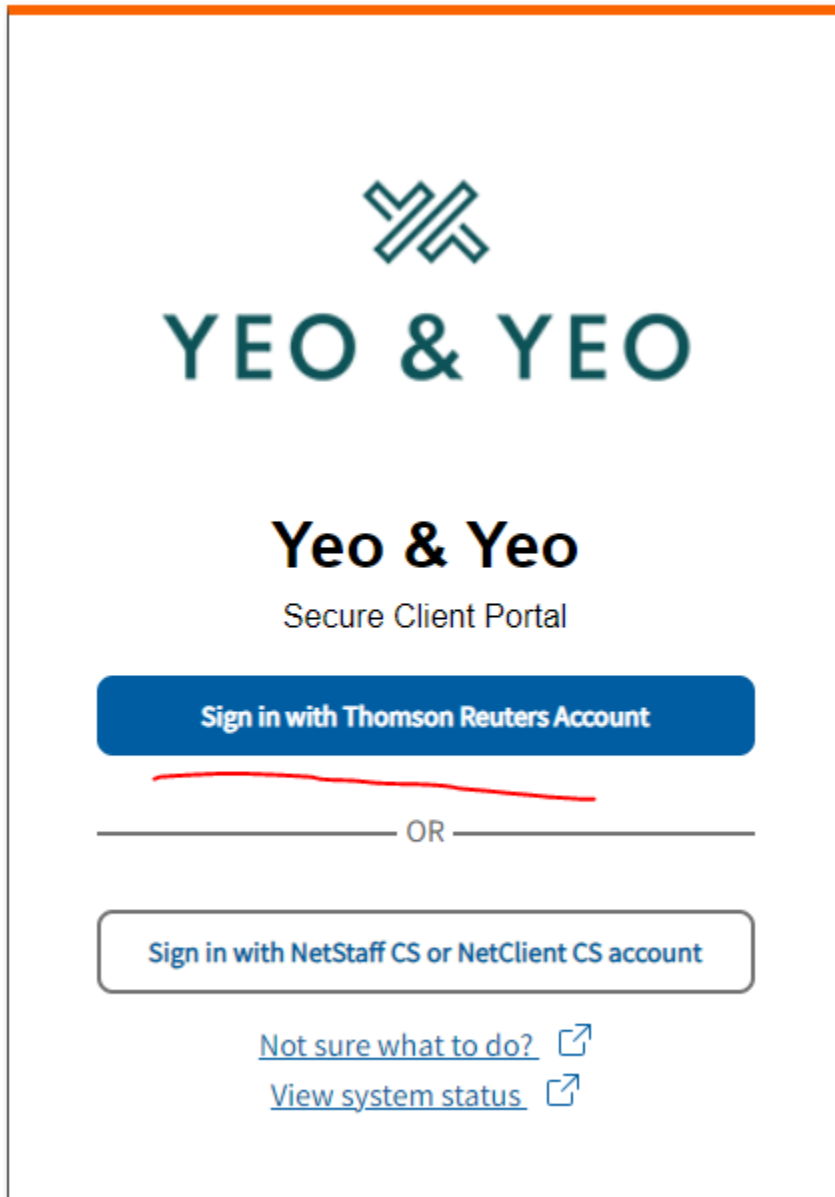
Congrats!! Your NetClient CS portal has been set up!

2. Where do I go to log in to my NetClient CS portal account?

- You can find a link to the NetClient CS login page on Yeo & Yeo's website at www.yeandyeo.com.
- Click on [Client Portals and Payment](#) in the top right corner (located on every site page), then click on [NetClient CS - Payroll & Accounting Client Portal](#).
- You can also save/bookmark this link to the NetClient CS login page: <https://secure.netlinksolution.com/nextgen/?firm=12152>.



When logging in, choose Sign in with Thomson Reuters Account.



3. What if I forgot my login user ID?

Your NetClient CS login user ID is your email address.



4. What if I forgot my password?

On the NetClient CS login page, click 'Reset password?'

A screenshot of the NetClient CS login page. The page has a white background with a grey vertical bar on the left side containing a pattern of circles. The main content area is centered and contains the following elements: the text "Sign in to NetStaff CS or NetClient CS" in a dark blue font; a text input field containing "27winifred@gmail.com" with a blue "Edit" link to its right; a password input field labeled "Password" with a grey "..." icon and a grey eye icon to its right; a blue link "Reset your password" with a red underline; and a large orange rounded button labeled "Sign in".

You will be asked to enter your email address to send a link to reset your password:

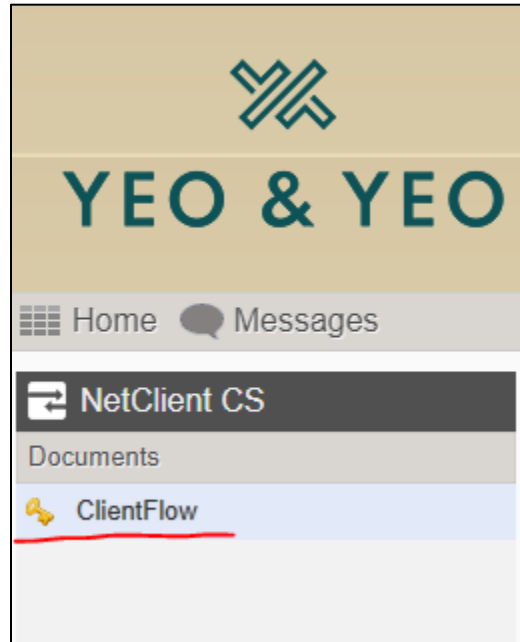


The screenshot shows a password reset page for Thomson Reuters. At the top left is the Thomson Reuters logo. Below it, the text reads "Reset your password". Underneath, there is a message: "Enter the email that's associated with your Thomson Reuters account and we'll send a link to reset your password." Below this message is an email input field with the placeholder text "Email" and the value "27winifred@gmail.com". To the right of the input field is a small grey icon with three dots. Below the input field is a large orange button labeled "Send link". At the bottom of the page is a blue link labeled "Back to sign-in".

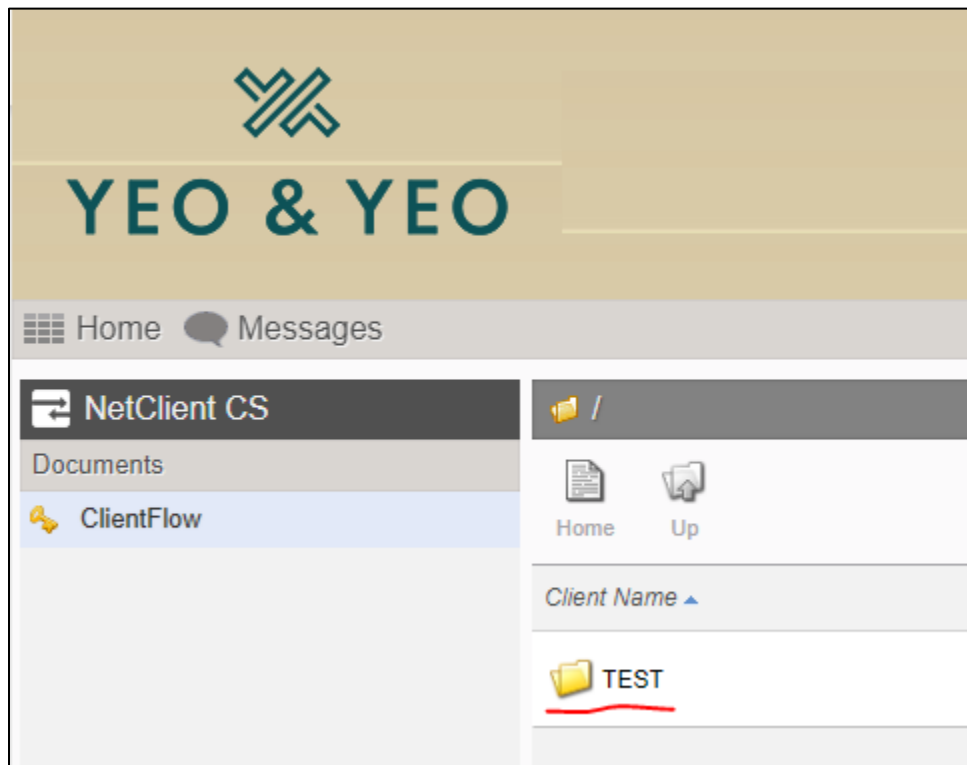
5. How do I upload a document?

Log in to your NetClient CS portal account.

Click on 'ClientFlow' on the left side of the portal screen:

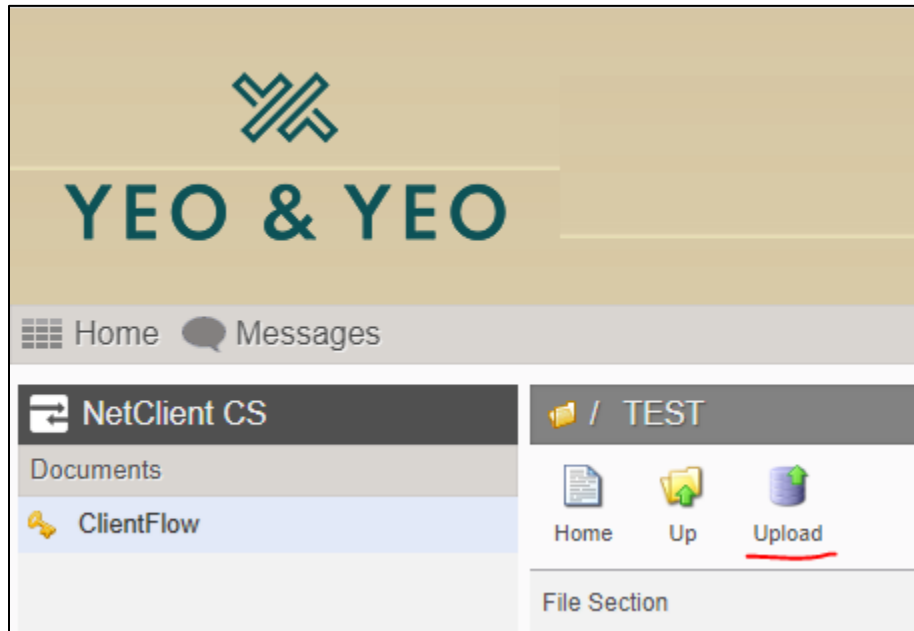


Click on your individual client name or your business client name (i.e., 'TEST' in the screenshot below); if you have multiple client names, confirm you are clicking on the client name that relates to the documents you are uploading:





Click on the 'Upload' button:



You have two options to upload documents: 1) Highlight and drag the documents to the area marked as 'Drag files here.' or 2) click on 'Add files,' browse to the folder on your computer where the documents are located, and select them. After selecting all the files, click 'Open.'

Once the files are listed under 'Filename,' click 'Start upload.'



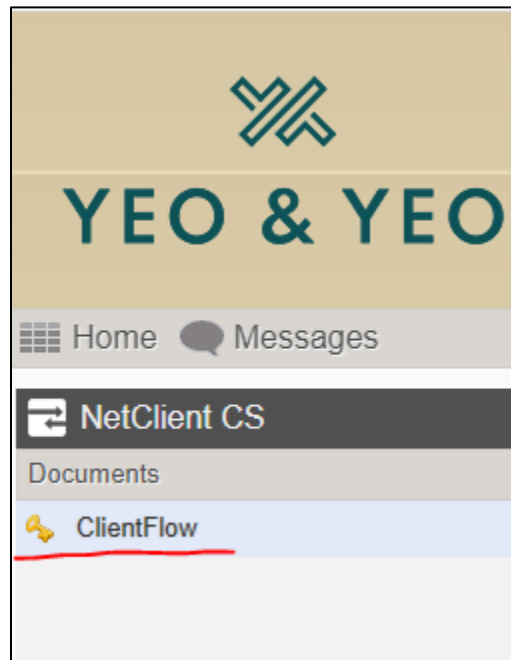


6. What happens when I receive a document in my portal?

When Yeo & Yeo uploads a document to your portal, the person uploading the document may send you an email or otherwise contact you to let you know a document is available.

Log in to your NetClient CS portal account.

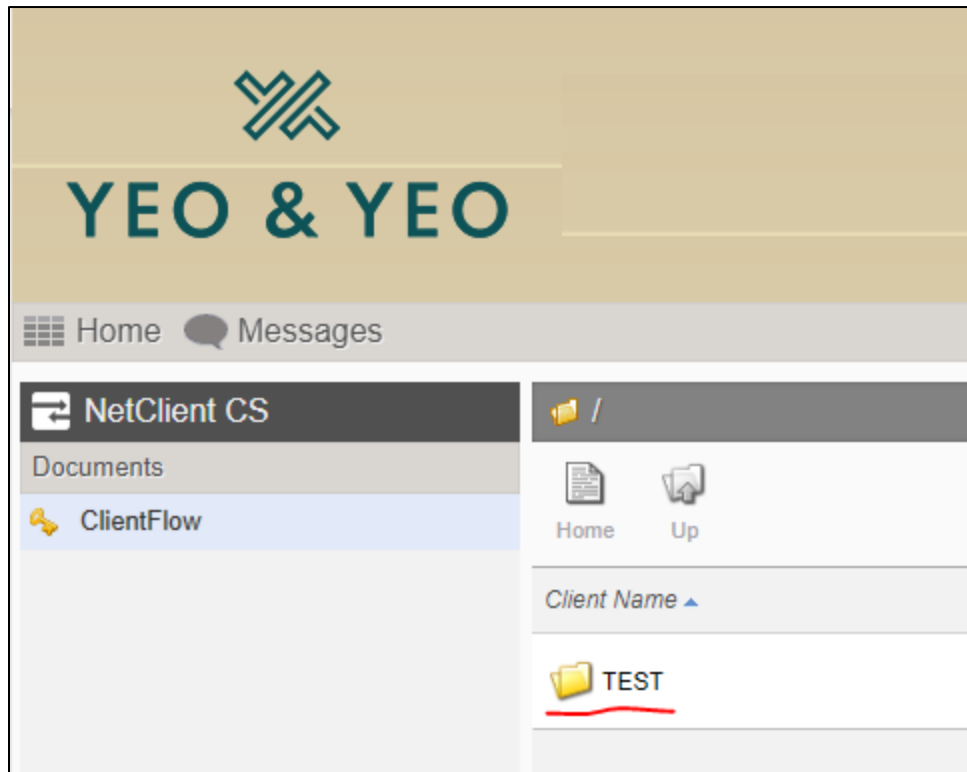
Click on 'ClientFlow' on the left side of the portal screen:





NetClient CS Client Portal FAQ

Click on your individual client name or your business client name (i.e., 'TEST' in the screenshot below); if you have multiple client names, confirm you are clicking on the client name that relates to the documents you are trying to view:



The portal sorts alphabetically by description each time you log in. Click the document date twice to move the newest documents to the top.



Frequently Asked Questions / Troubleshooting

Q: What browsers are supported by the portal?

A: The portal supports Google Chrome and Microsoft Edge.

- If using a Mac, Chrome should be installed and used rather than Safari.
- If using an iPhone or iPad, the NetClient CS app should be installed and used rather than Safari.

Q: What are my options for multi-factor authentication?

A: The preferred multi-factor authentication method is to download the Auth0 Guardian app from the app store on your mobile device. This will push the multi-factor authentication message to your phone for easy access.

Other authenticator apps also work. However, they do not push the message, meaning you must know to open the app to be prompted for multi-factor authentication and type the code into the website.

Adding a phone will allow a code to be sent via text message or a phone call (your choice). Your email address is automatically enabled as a backup method.

Q: When trying to get into a folder on the portal, an error message occurs (“An error has occurred. Please close the document and reopen it.”). How do I get into the folder?

A: This typically indicates you have double-clicked on the folder name. Instead, single-click on the folder name.

Q: Only the first page of the PDF is showing for me. How can I see the entire PDF that is in my portal?

A: The programming of the portal website assumes you have certain additional programs installed and available on your device. This may not necessarily be the case, especially with mobile devices. Most computer browsers will open the complete PDF for you to view, so it is recommended that you open the PDF on your computer rather than on a mobile device.

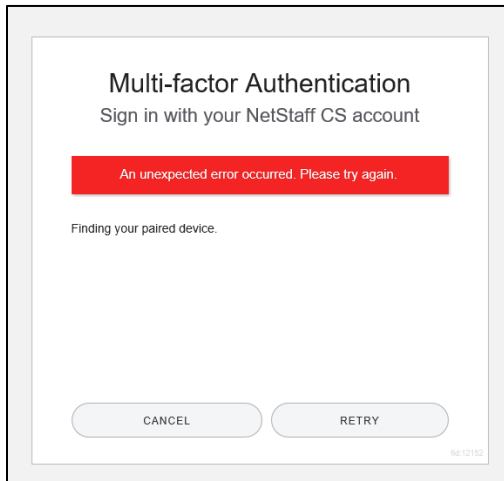
For those needing to use Mobile devices, there is an app called NetClient CS.



You can download this app and log in using the same login and password as you do on the website.



Q: I am trying to log in to the portal website but getting an unexpected error, such as this one. How do I get in?



- A:** Multiple things may work, depending on the exact situation.
- First, click the **RETRY** button in the message and try logging in again. **Do not** refresh or reload the page. (Reloading the page will cause you to get the error again, whereas **RETRY** may not).
 - If that does not work, close out of the browser you were in. Open a different browser. (If you were in Chrome, try Microsoft Edge, or vice versa). Try logging in in the new browser. We would **expect** the first time in the new browser to get the unexpected error message. Click **RETRY** and log in again.
 - We have had some success closing out all programs, restarting the machine, and trying again.
 - If none of those work, you must clear out your cache/cookies. Be aware this is Thomson Reuter's **first** choice for reliability, but it will cause you to lose saved passwords and other things that may have legitimately been stored in cache/cookies. The steps vary from browser to browser.

How to clear cache/cookies for Chrome (see snip on next page):

- While in Chrome, hold down Control+Shift+Delete simultaneously.
- Click on **Advanced**. Change the Time range to **All Time**, and make sure the top four boxes are marked. Then click 'Clear data.'
- Close out **all** Chrome sessions that are open.
- Reopen Chrome and try to log in again.



Clear browsing data

Basic Advanced

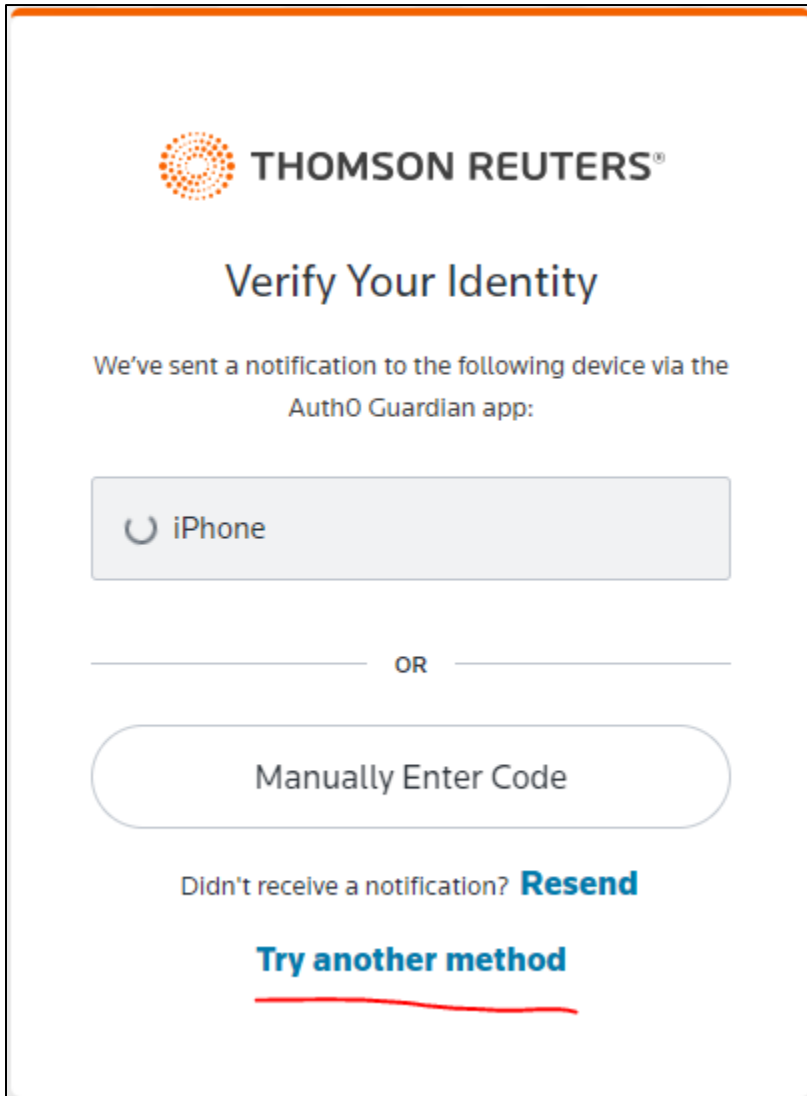
Time range All time

- Browsing history
54 items
- Download history
None
- Cookies and other site data
From 78 sites
- Cached images and files
41.8 MB
- Passwords and other sign-in data
None
- Autofill form data



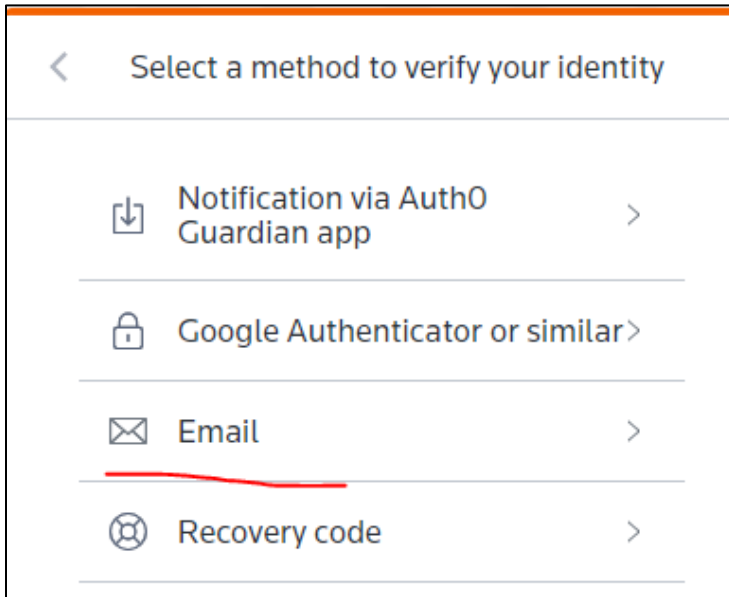
Q: I set up multi-factor authentication. Now, I cannot get it to work. What should I do?

A: Click 'Try another method.'

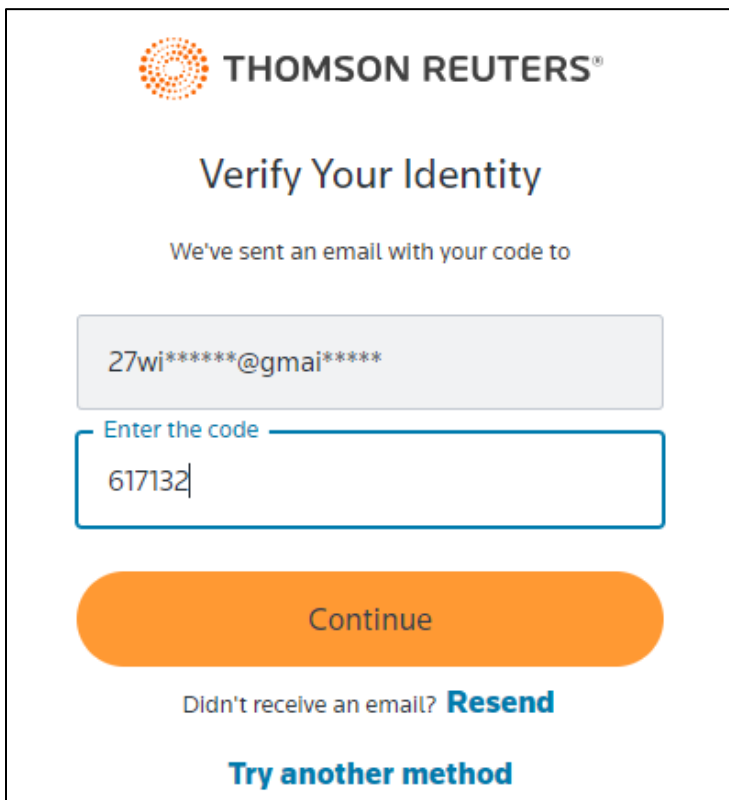




Choose email.



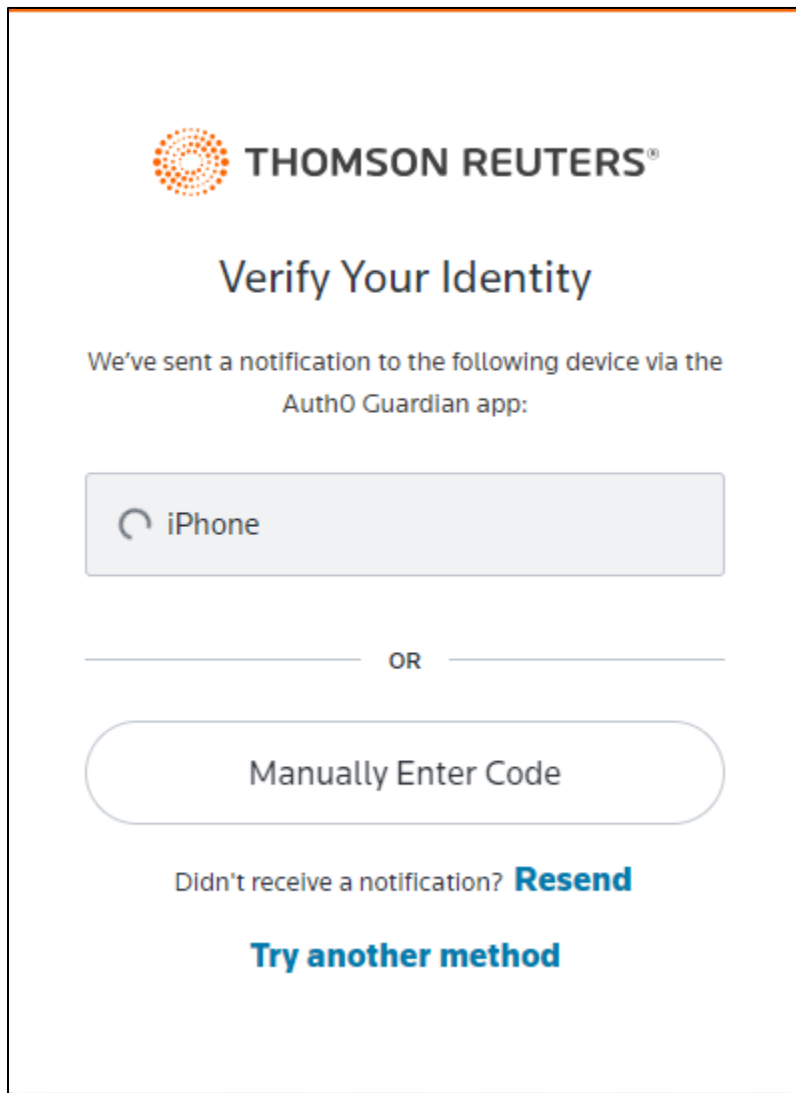
Enter the code from the email you will receive.



Click 'Continue.'



Q: I don't recall setting up multi-factor authentication, but it tells me to verify my identity. What should I do?




A: Click 'Try another method.'



Verify Your Identity

We've sent a notification to the following device via the
Auth0 Guardian app:

 iPhone

OR

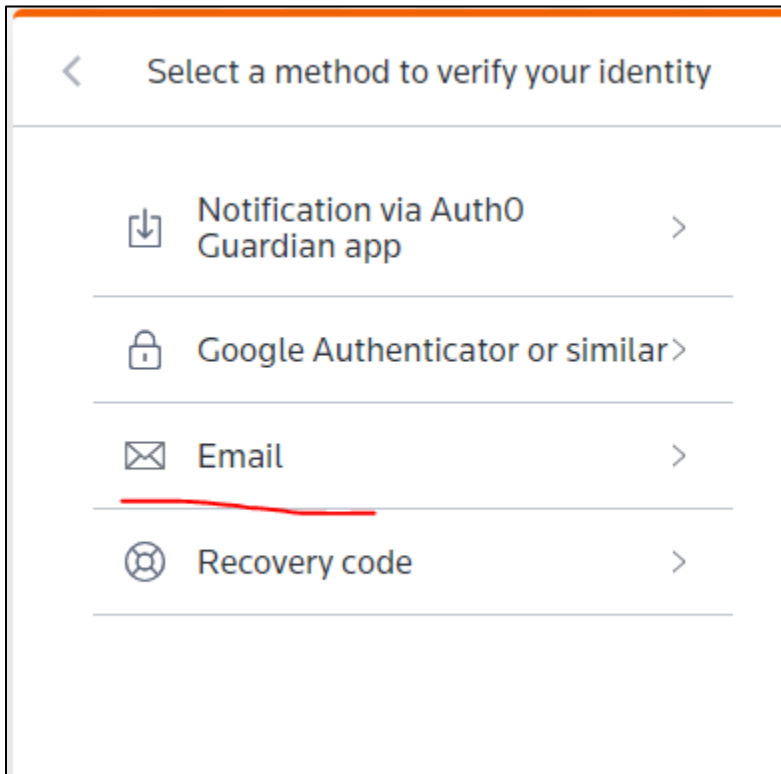
Manually Enter Code

Didn't receive a notification? [Resend](#)

[Try another method](#)




Choose email.





Enter the code from your email.

 **THOMSON REUTERS®**

Verify Your Identity

We've sent an email with your code to

27wi*****@gmail*****

Enter the code

617132

Continue

Didn't receive an email? **Resend**

Try another method

Click 'Continue.'

For additional portal support, please contact your local Yeo & Yeo office.