Roesner | Kenney Tax & Accounting

Client Portal User Guide

In order to use this guide, you must have been granted access to use the Roesner|Kenney Tax & Accounting secure portal.

If you are unsure whether you have access, please contact us at (763) 210-9956 or roesnertax@roesnertax.com

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Quick Start Guide

This quick start guide is intended to help you get setup and working with your secure portal right away. For more detailed instructions see the complete portal users guide at https://c09614528.preview.getnetset.com/files/Client-Portal-User-Guide.pdf .

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1. **Setup initial access to your secure portal**
    a. Check your email for a notification that you have been added
    b. Click the link in the email and verify your information
    c. Setup your password
    d. This will bring you to your home screen (secure folder/portal)

2. **Login to your secure portal**
    a. Go to our website at http://roesnertax.com/portal/
    b. Click on "Client Portal Login"
    c. Enter your username and password
    d. This will bring you to your home screen (secure folder/portal)

3. **Retrieve a file from us**
    a. Check your email for notification that a file(s) are available for you to download
    b. Click the link in the email
    c. Enter your username and password
    d. Click the box in front of the file(s) you want to download
    e. The download box will appear on the bottom left corner of your screen
    f. Click the arrow next to the file(s) and select show in folder
    g. The Downloads window will open and you can open and view the file(s) from there. (Note: large files may take a few minutes to download)

4. **Upload a file to us**
    a. Go to our website at http://roesnertax.com/portal/
    b. Click on "Client Portal Login"
    c. Enter your username and password
    d. This will bring you to your home screen (secure folder/portal)
    e. Click the green + sign in the upper right of the screen
    f. Select "Upload File"
    g. The upload window will appear, click on "Browse Files"
    h. Your computer files explorer window will appear, locate the file you want to upload, click it and click save.
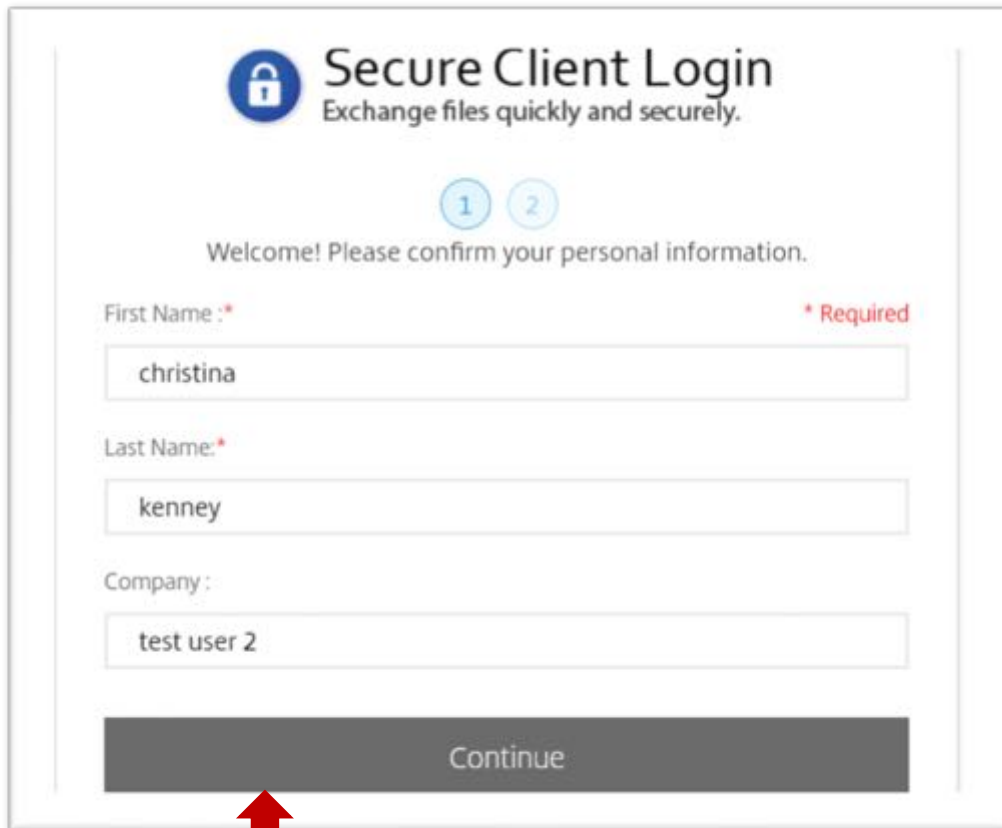   i. The Upload Window will appear, click "Upload"

Initial Set-Up

Check Your Email & Setup a Password

Once you have been added to the portal system, you will receive an email notification .

1. Click the *"Click here to activate your account and view this folder"* link to access the login page.
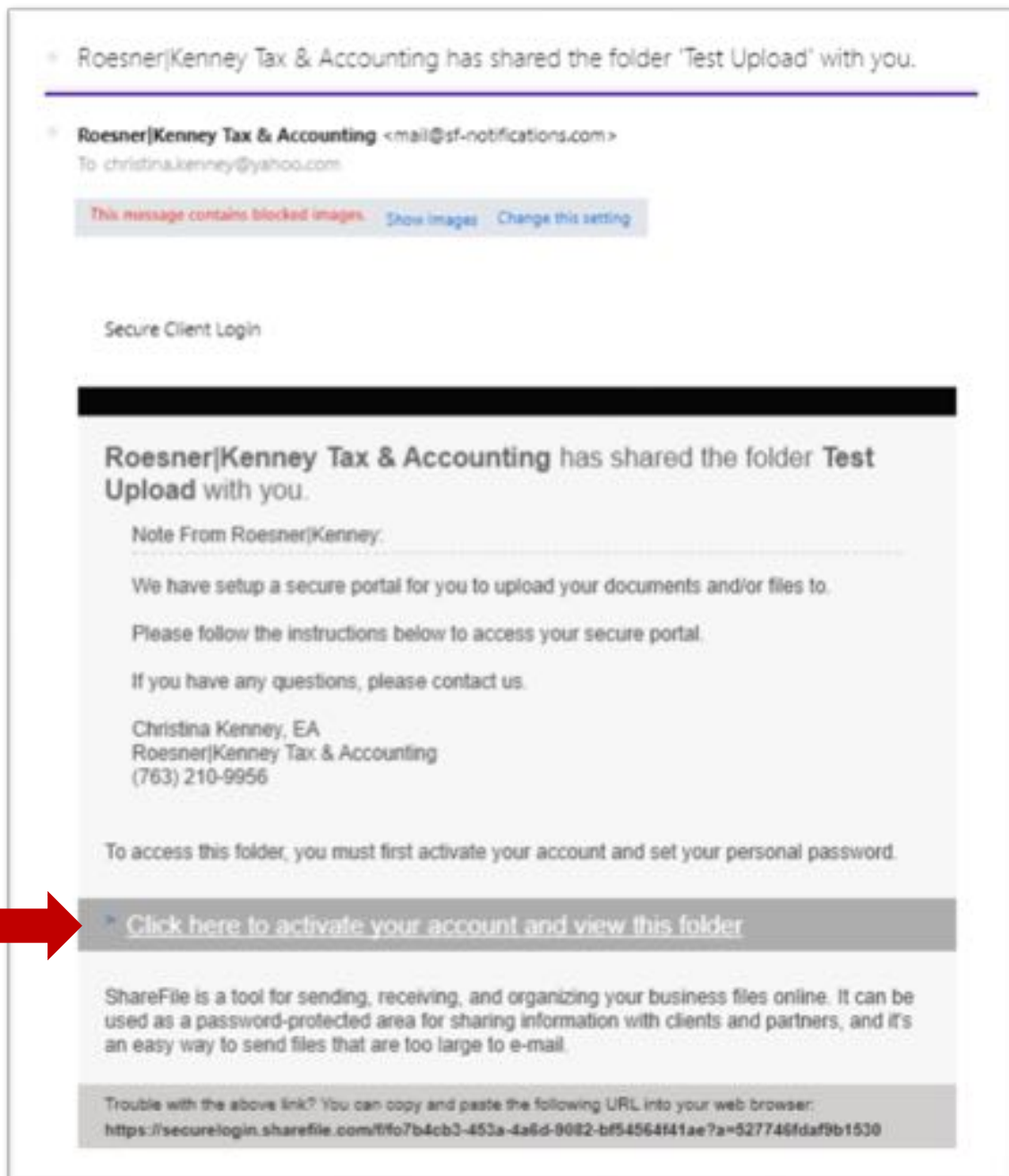
1. **Verify** your information listed on the screen and **make any changes necessary**

Secure Client Login
Exchange files quickly and securely.

① ②

Welcome! Please confirm your personal information.

First Name :*   * Required

christina

Last Name:*

kenney

Company :

test user 2

Continue

2. Click **"Continue"**

3. **Create a password** to access your secure portal

Secure Client Login
Exchange files quickly and securely.

Your username is **christina.kenney@yahoo.com**.

Please create a password.

Please create a password that meets the following requirements:

at least 1 Upper Case letter
at least 1 Lower Case letter
at least 1 number
at least 8 characters in length
Password and Confirm Password should match

Password: ☐ Show Password

Confirm Password:

4. When all the requirements in the blue box have green checkmarks next to them, click **"Save and Sign In"**

Your username is **christina.kenney@yahoo.com**.

Please create a password.

Please create a password that meets the following requirements:

✓ at least 1 Upper Case letter
✓ at least 1 Lower Case letter
✓ at least 1 number
✓ at least 8 characters in length
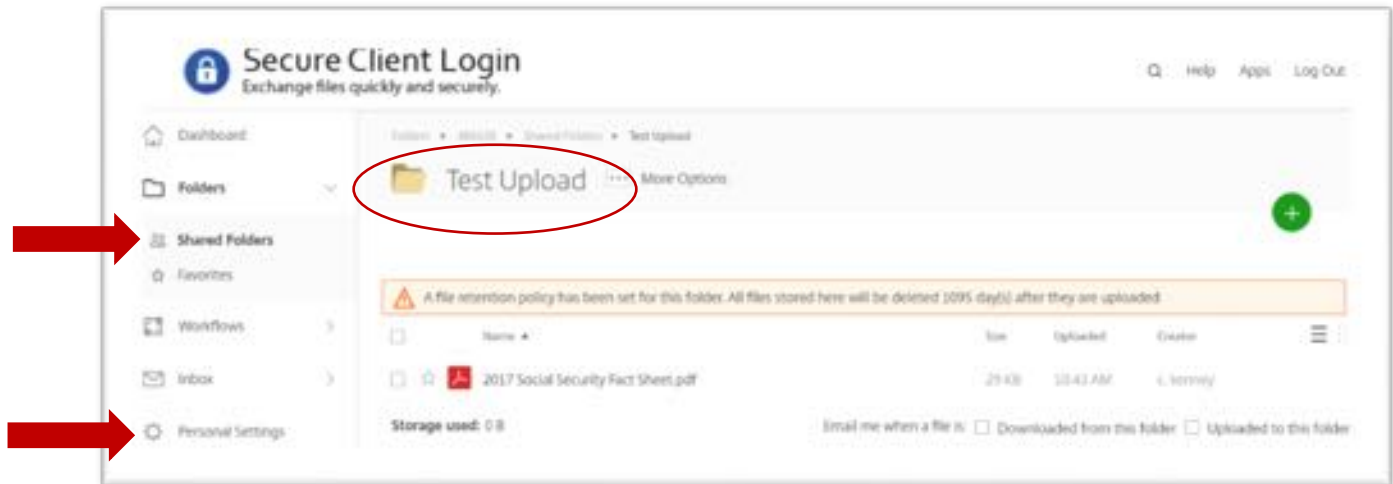✓ Password and Confirm Password should match

Password: ☐ Show Password

••••••••••

Confirm Password:

••••••••••

Back   Save and Sign In

Your Secure Portal Folder

Your folder will be the home page that you see every time you login.

1. You will <u>not</u> need to access the following items on the left menu:
    a. Dashboard
    b. Workflow
    c. Inbox

2. **Shared Folders** – Clicking on this item will display all secure main folders that you have access to

3. **Personal Settings** allow you to update your name, password and email address

Secure Client Login
Exchange files quickly and securely.

Edit Profile
Two-Step Verification
Advanced Connections
My Apps & Devices

Edit Profile

Name and Company Details

First Name:*

christina

Last Name:*

kenney

Company

test user 2

Profile Picture

CK

Upload

Change Password

Old Password:*

New Password:*

Confirm Password:*

Secure Client Login
Exchange files quickly and securely.

Edit Profile
Two-Step Verification
Advanced Connections
My Apps & Devices

Edit Email Addresses

You may log in to ShareFile using any of your confirmed emails. ShareFile notifications will be sent to your primary email address.
NOTE: Do not use this functionality to add new users to the system.

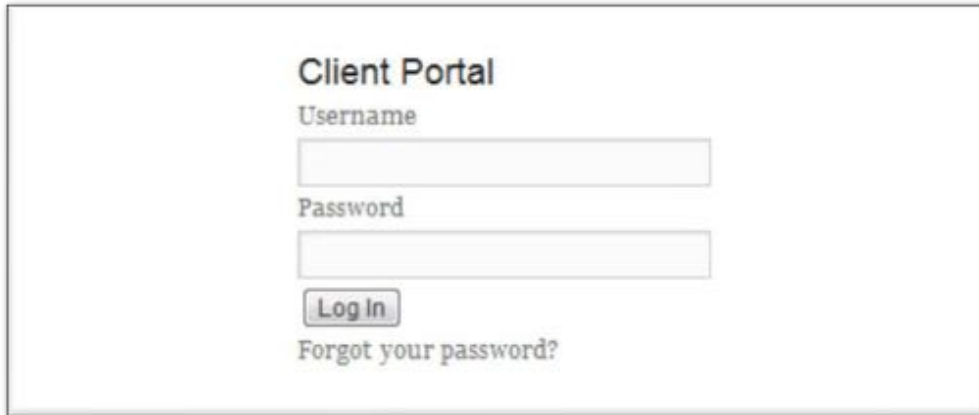| Email	Primary	Verified	Actions
christina.kenney@yahoo.com	✓	✓	

Add Alternate Email

Logging In

To login in to your secure portal without a link in your email follow the directions below:

1. From your internet browser go to our website at http://roesnertax.com/portal/

2. Click on the Client Portal Login button

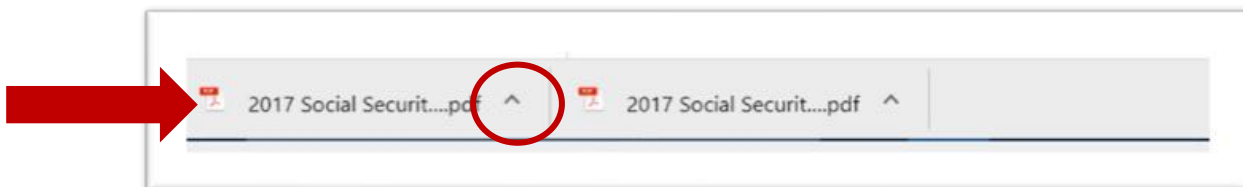3. Enter your **Username** and **Password**

Downloading a File / Document

Downloading a file means to take a file from your secure portal folder and put it on your personal computer.

1. To download a file, click the **box in front of the file(s)** you want to download.

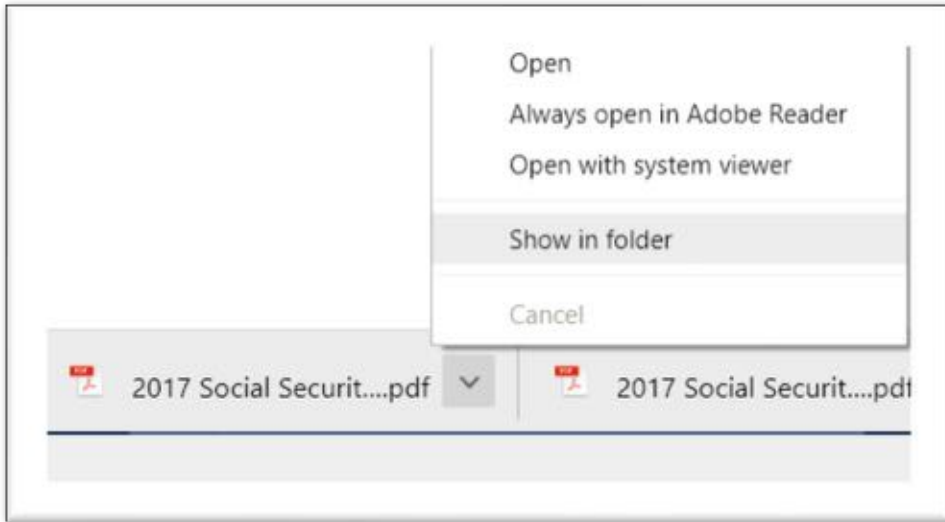2. A new menu will appear above the file name. Click on **"Download"**
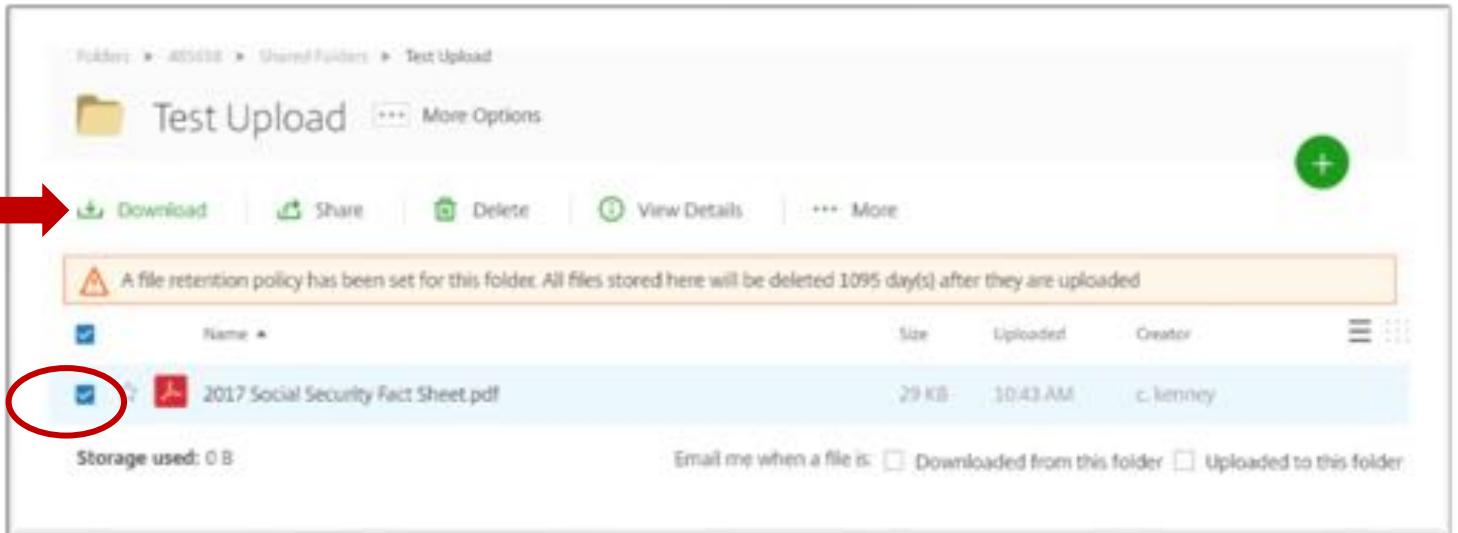
You can download multiple files at one time

3. Notification of the downloading file will appear on the bottom left corner of your screen

4. Click on the **arrow** next to the downloading notification and select **"Show in Folder"** from the pop up menu

5. This will open a windows explorer window on your screen. Locate the filename and click to open and view it.
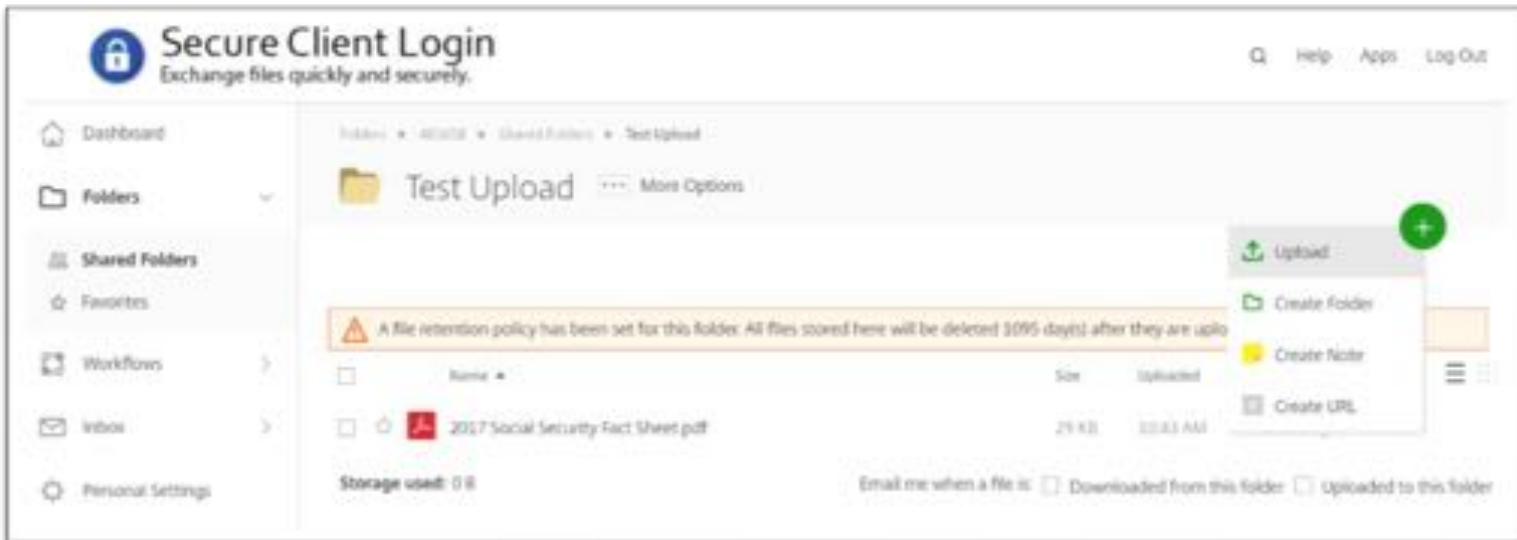
   Note: Generally, the default location for files downloaded from the Secure site will be the "Downloads" folder.
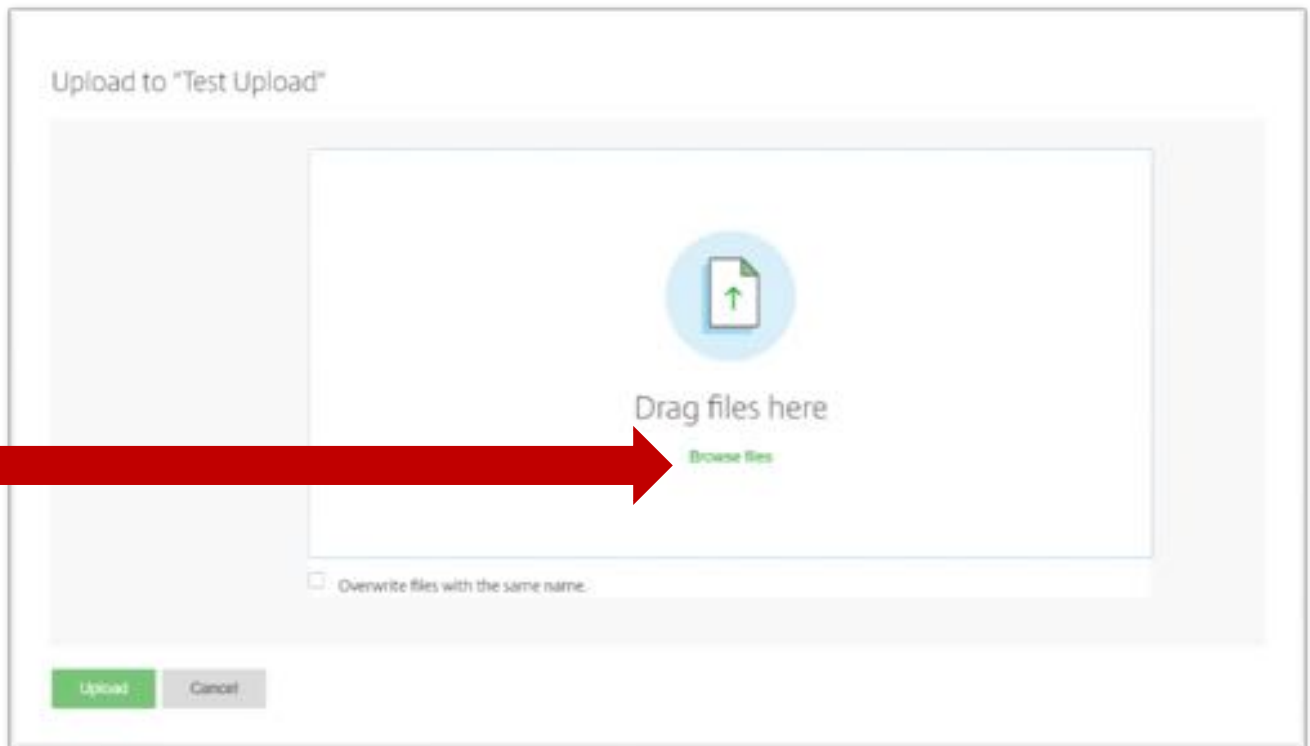
Uploading a File / Document

Uploading a file means to take a file from your personal computer and put it in your secure portal file so we can access it.
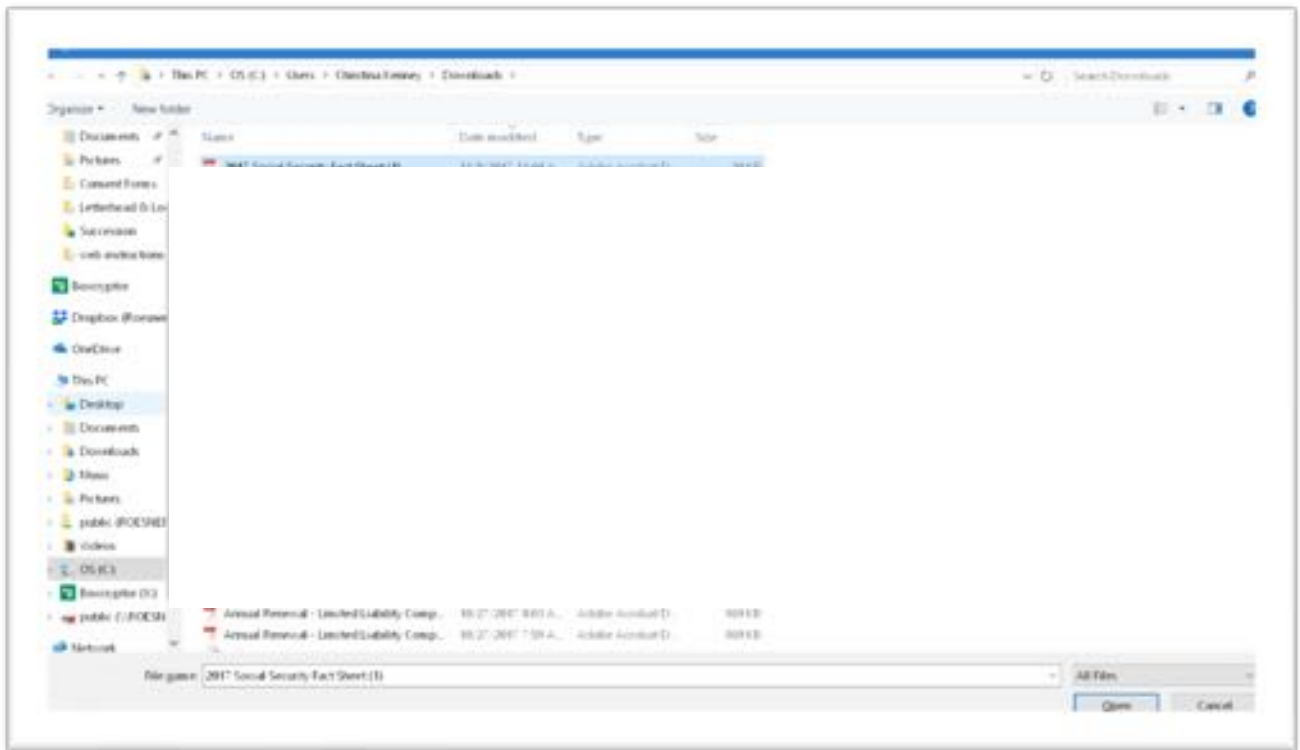
1. To upload a file, **Click** the green ⊕ sign in the right corner.

2. Select **"Upload"**

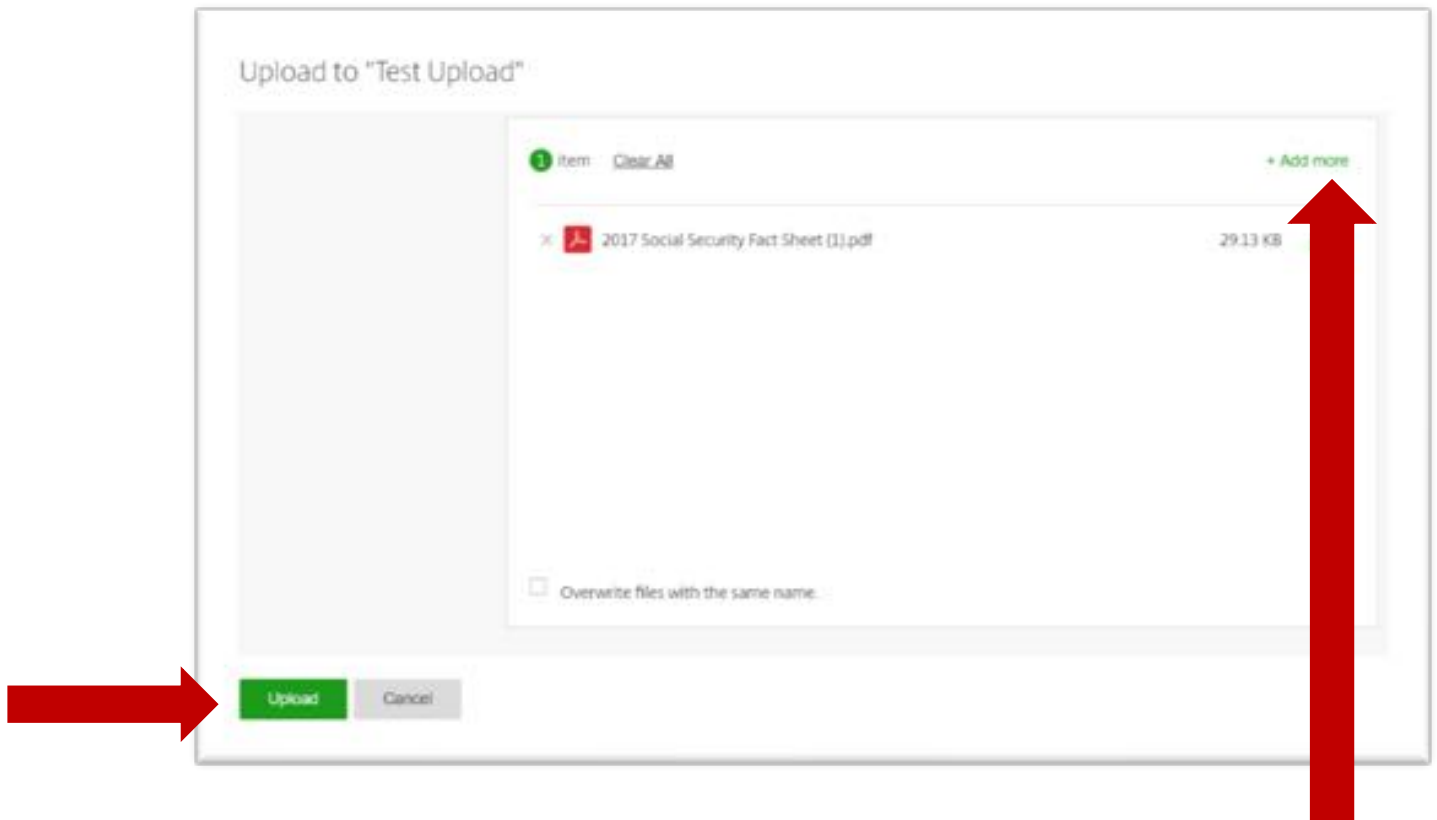3. The Upload files window will appear, **Click on "Browse Files"**

4. **Locate and select** the file on your computer you want to upload

5. Click "**Open**"

6. The file will appear in the Upload Window

7. If you want to upload additional files, click on **"Add More"** and **repeat steps 4-6**

8. When all files appear in the upload window, **click "Upload"**

9. The Secure File window will appear and display the status of the file(s) uploading

10. **Once the upload is complete a notification will be sent to us that your file(s) are ready for us to retrieve**

11. Click **"Log Out"** in the upper right corner