

# Kenney Tax & Accounting, LLC

## Client Portal User Guide



**To use this guide, you must have been granted access to use the Kenney Tax & Accounting, LLC secure portal.**

**If you are unsure whether you have access, please contact us at (763) 210-9956 or [kenneytax@kenneytax.com](mailto:kenneytax@kenneytax.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 <https://kenneytax.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

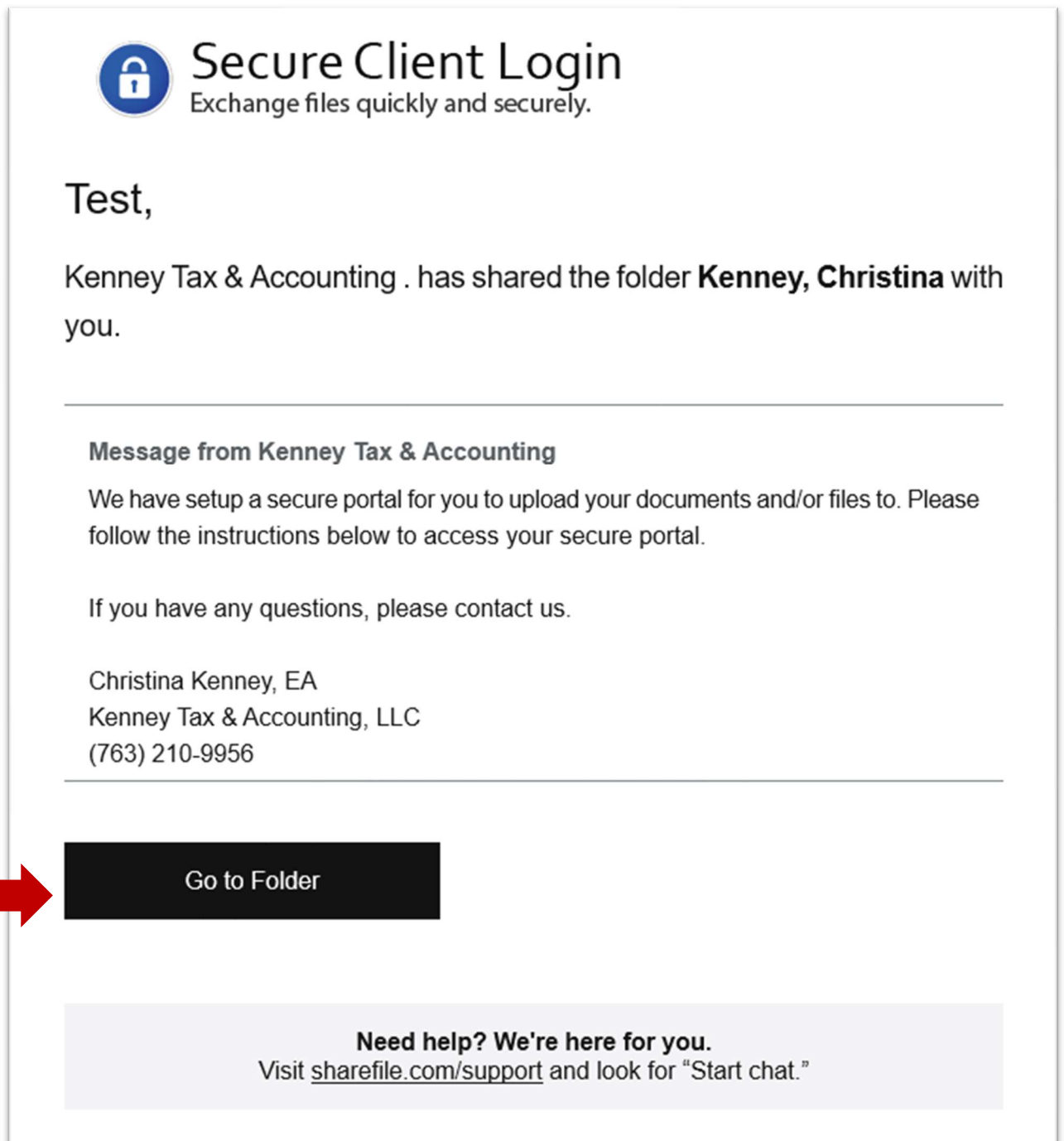
- a. Go to our website at <https://kenneytax.com/portal/>
- b. Click on “Client Portal Login”
- c. Enter your username and password
- d. This will bring you to your home screen (secure folder/portal)
- e. Click on “Shared Folders”
- f. Click on your name folder
- g. Click the blue + sign in the upper right of the screen
- h. Select “Upload File”
- i. The upload window will appear, click on “Browse Files”
- j. Your computer files explorer window will appear, locate the file you want to upload, click it and click save.
- k. 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 "Go to Folder" link to access the login page.



 **Secure Client Login**  
Exchange files quickly and securely.

Test,

Kenney Tax & Accounting . has shared the folder **Kenney, Christina** with you.

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**Message from Kenney Tax & Accounting**

We have setup a secure portal for you to upload your documents and/or files to. Please follow the instructions below to access your secure portal.

If you have any questions, please contact us.

Christina Kenney, EA  
Kenney Tax & Accounting, LLC  
(763) 210-9956

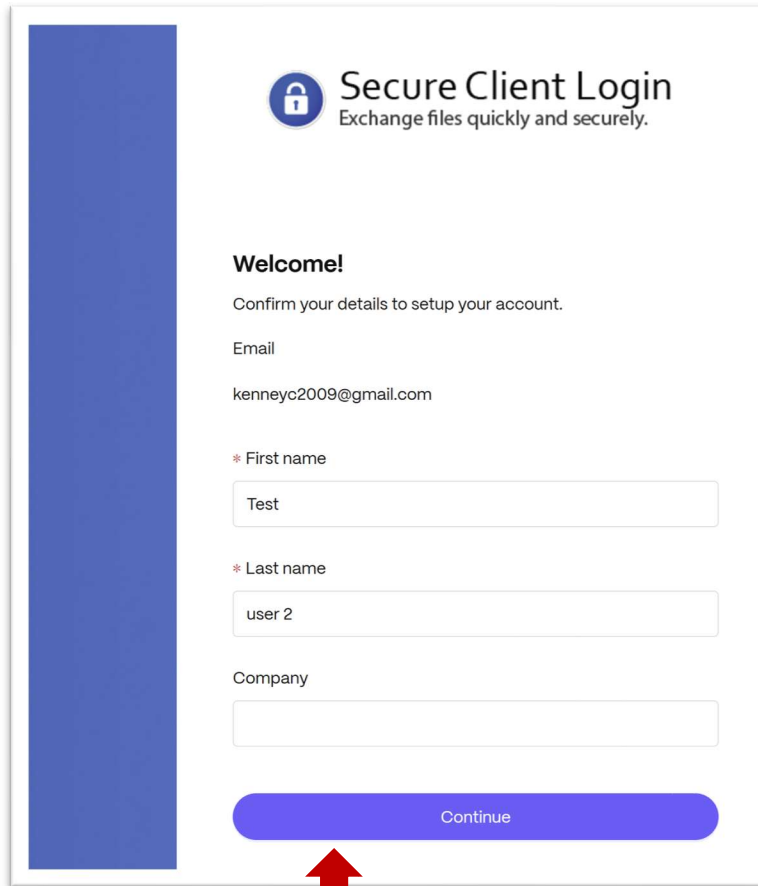
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**Go to Folder**

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**Need help? We're here for you.**  
Visit [sharefile.com/support](https://sharefile.com/support) and look for "Start chat."

2. **Verify** your information listed on the screen and **make any changes necessary**



The image shows a 'Secure Client Login' form. At the top left is a blue vertical bar. To its right is a lock icon in a blue circle, followed by the text 'Secure Client Login' and 'Exchange files quickly and securely.' Below this is a 'Welcome!' section with the instruction 'Confirm your details to setup your account.' The form contains the following fields: 'Email' with the value 'kenneyc2009@gmail.com', '\* First name' with the value 'Test', '\* Last name' with the value 'user 2', and 'Company' which is empty. At the bottom is a blue rounded button labeled 'Continue'. A red arrow points upwards to the 'Continue' button.

3. Click **“Continue”**
4. **Create a password** to access your secure portal

**Secure Client Login**  
Exchange files quickly and securely.

### Create a ShareFile password

Passwords must meet the following requirements

- include at least 1 upper case letter
- include at least 1 lower case letter
- include at least 1 number
- include at least 1 special characters
- be at least 8 characters long
- Passwords should match

We'll also perform an additional strength check on save. ⓘ

\* Password

\* Confirm password

Create password

5. When all the requirements have checkmarks next to them, click **“Create Password”**

**Secure Client Login**  
Exchange files quickly and securely.

### Create a ShareFile password

Passwords must meet the following requirements

- include at least 1 upper case letter
- include at least 1 lower case letter
- include at least 1 number
- include at least 1 special characters
- be at least 8 characters long
- Passwords should match

We'll also perform an additional strength check on save. ⓘ

\* Password

\* Confirm password

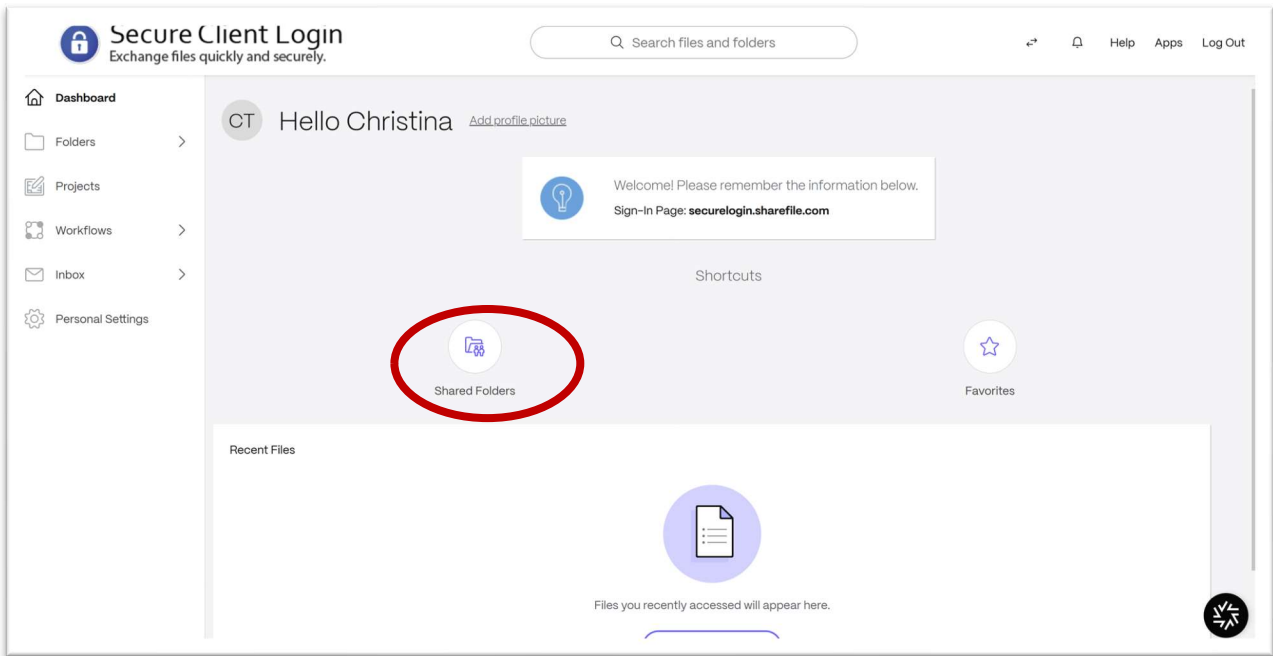
Create password

This will take you to your secure portal folder.

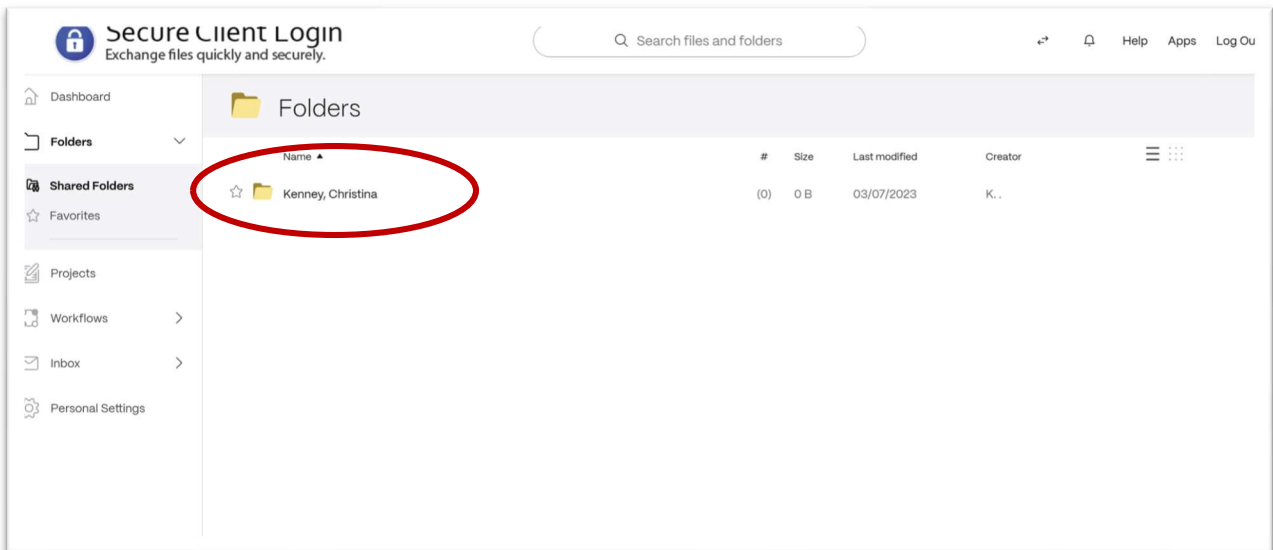
# Your Secure Portal Folder

When you login to your secure portal it will take you to the main dashboard.

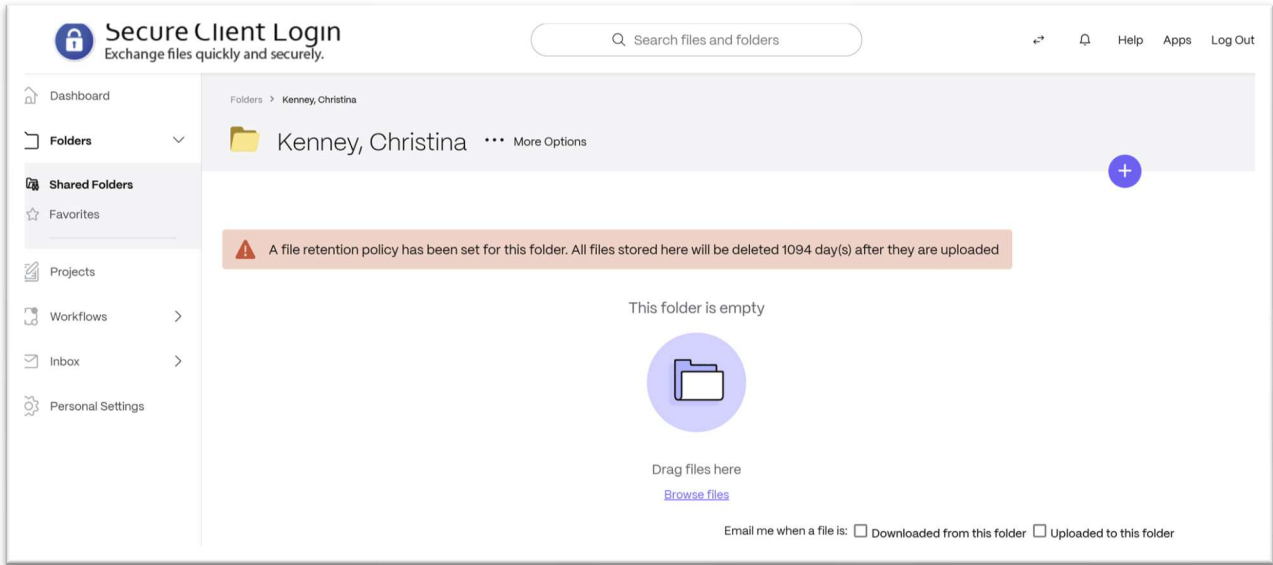
1. You will need to click on "Shared Folders" to access your folder window.



2. Click on your named folder



3. This will bring you to your secure folder page



You will not need to access the following items on the left menu:


- a. Workflow
- b. Inbox

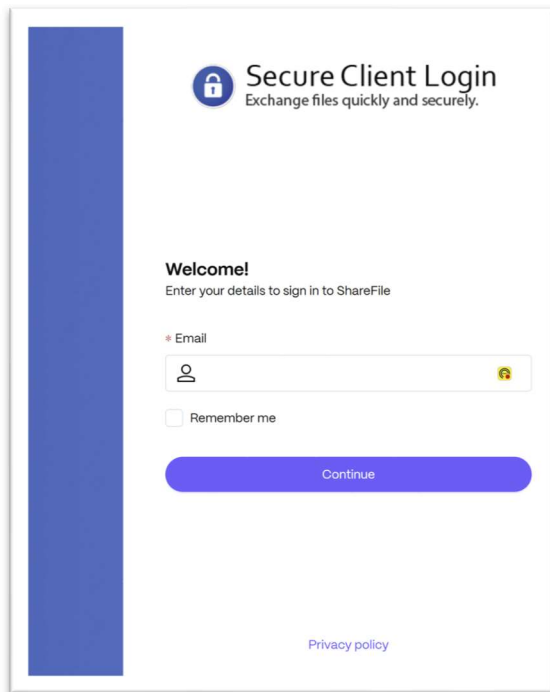
**Personal Settings** allow you to update your name, password and email address



# Logging In

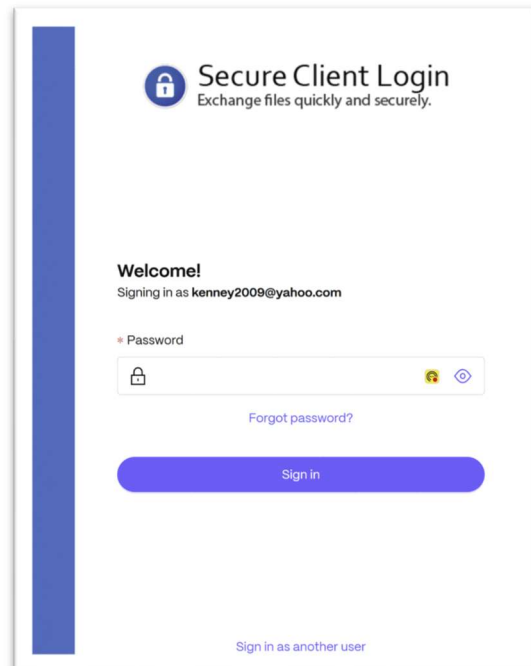
To login in to your secure portal without a link in your email follow the directions below:

1. From your internet browser go to our website at <https://kenneytax.com/portal/>
2. Click on the  button
3. Enter your **Username** and click **Continue**
4. Enter your **Password** and click **Sign In**



The screenshot shows the 'Secure Client Login' page with the following elements:

- Logo: A blue padlock icon next to the text 'Secure Client Login' and the tagline 'Exchange files quickly and securely.'
- Greeting: 'Welcome!' followed by 'Enter your details to sign in to ShareFile.'
- Form: A text input field labeled '\* Email' with a person icon on the left and a yellow eye icon on the right. Below it is a checkbox labeled 'Remember me'.
- Button: A large blue button labeled 'Continue'.
- Footer: A link for 'Privacy policy' at the bottom.



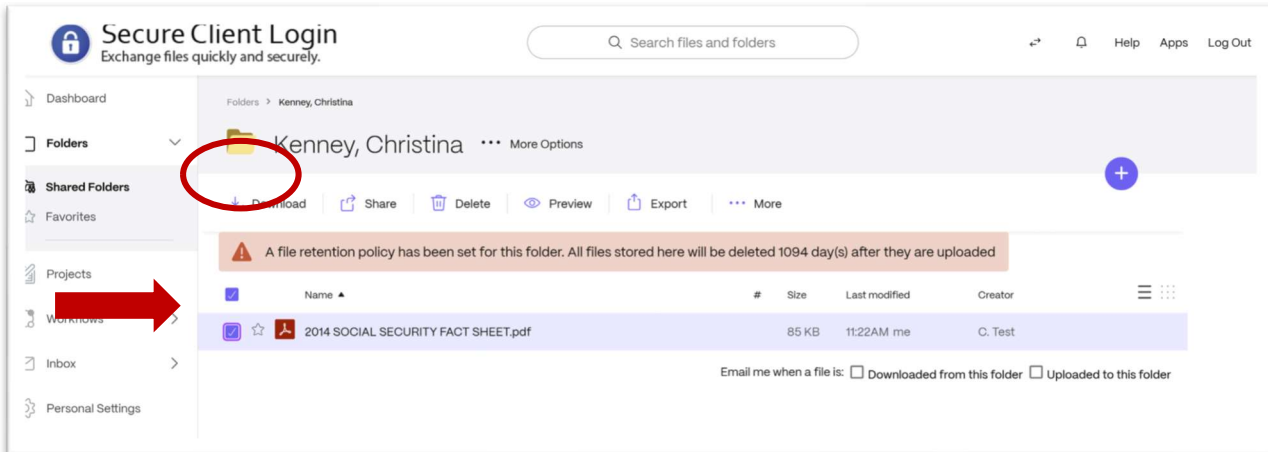
The screenshot shows the 'Secure Client Login' page with the following elements:


- Logo: A blue padlock icon next to the text 'Secure Client Login' and the tagline 'Exchange files quickly and securely.'
- Greeting: 'Welcome!' followed by 'Signing in as kenney2009@yahoo.com'.
- Form: A text input field labeled '\* Password' with a padlock icon on the left and yellow eye and eye-off icons on the right. Below it is a link for 'Forgot password?'.
- Button: A large blue button labeled 'Sign in'.
- Footer: A link for 'Sign in as another user' at the bottom.

# Downloading a File / Document

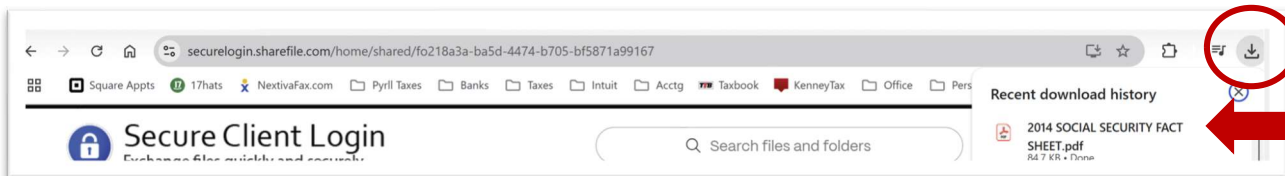
Downloading a file means to take a file from your secure portal folder and put it on your personal computer or device.

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”**

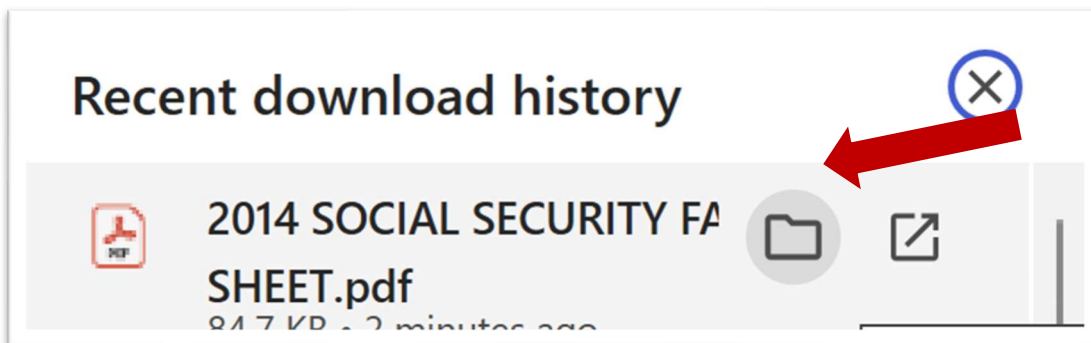


 **You can download multiple files at one time**

3. Notification of the downloading file will appear in the upper right side of your screen




4. If the file does not automatically open, you can click on the folder icon next to the file name and it will open the location the downloaded file was saved to.

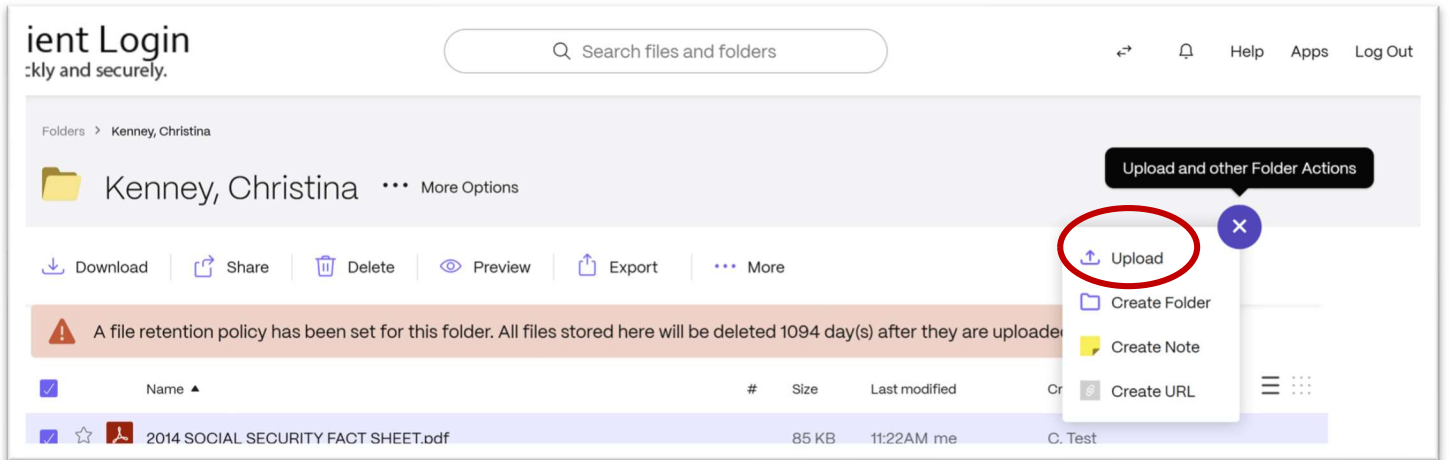


*Note: Generally, the default location for files downloaded from the Secure site will be the “Downloads” folder.*

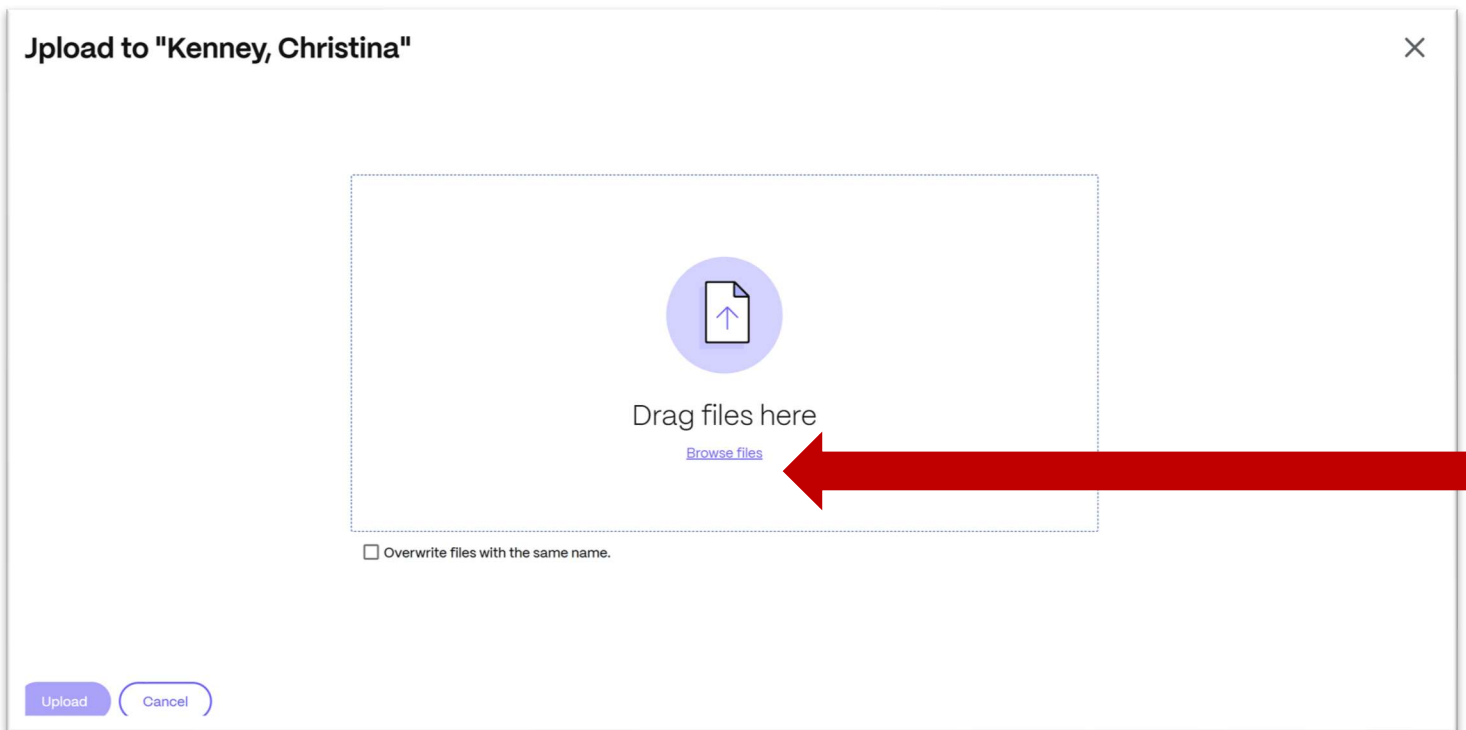
# Uploading a File / Document

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.

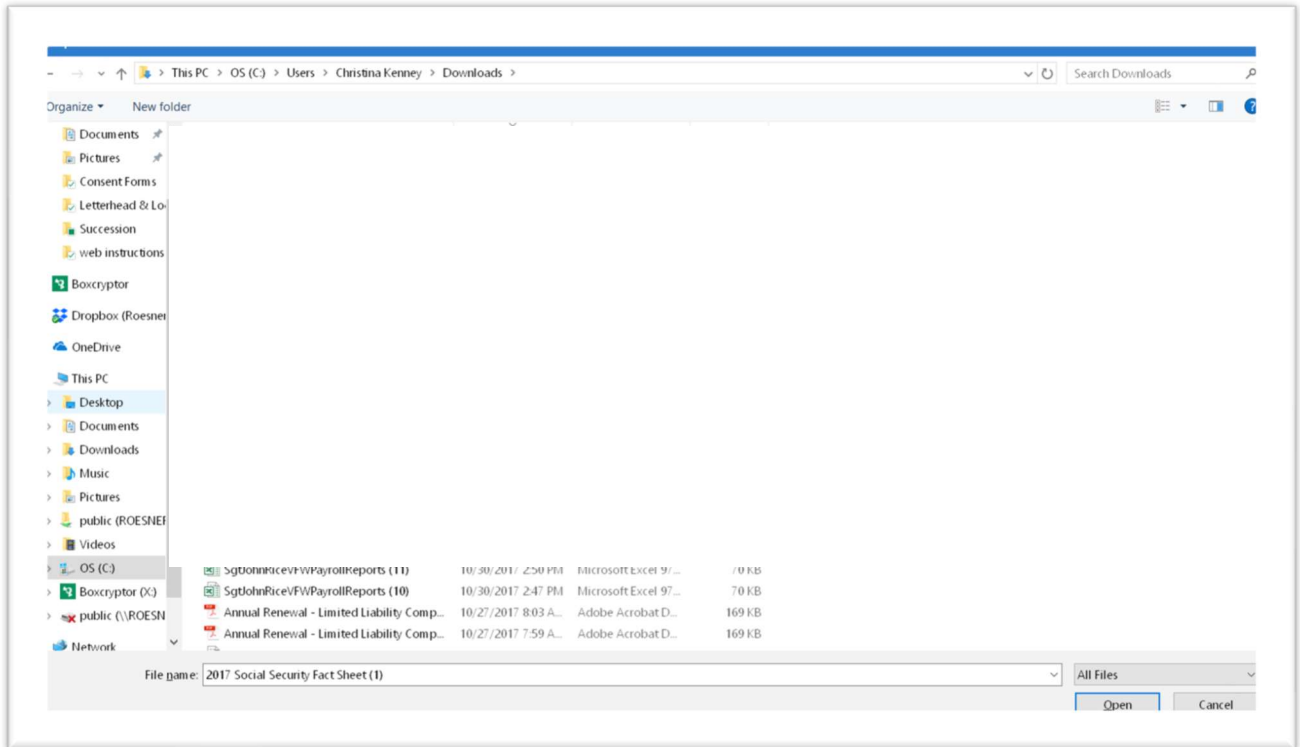
1. To upload a file, **Click** the blue plus  sign in the right corner.
2. Click **“Upload”**



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

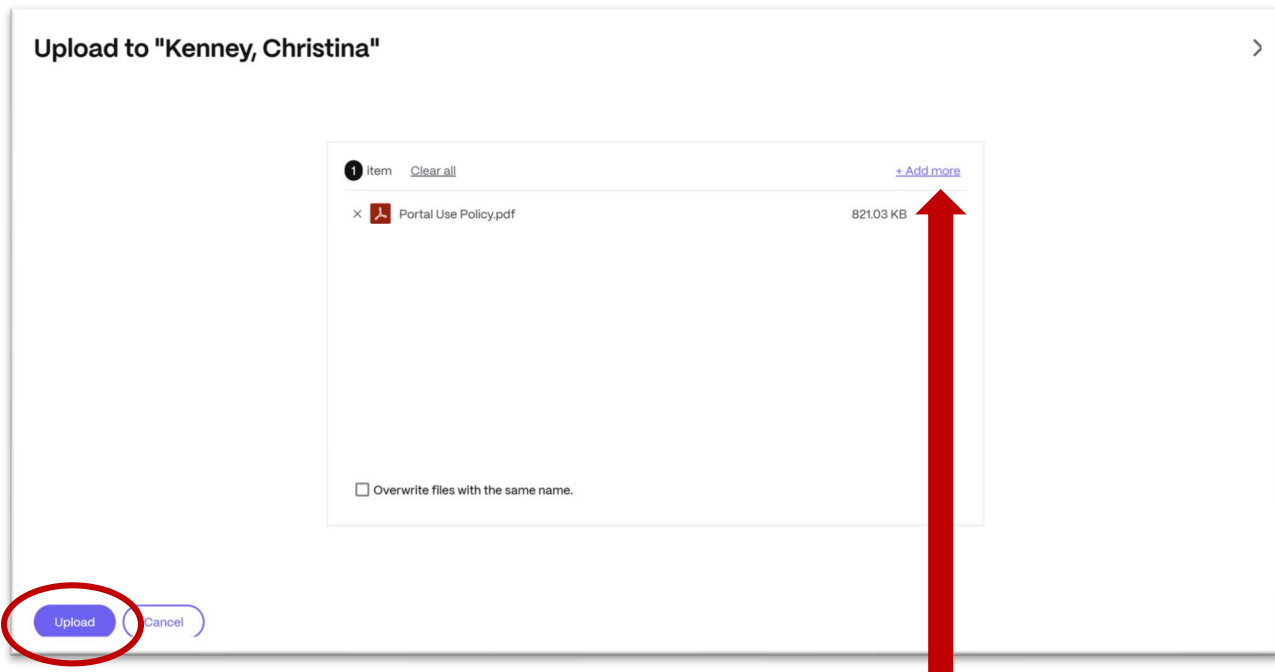


4. A new window will pop up. **Locate and select** the file on your computer you want to upload



5. Click **“Open”**

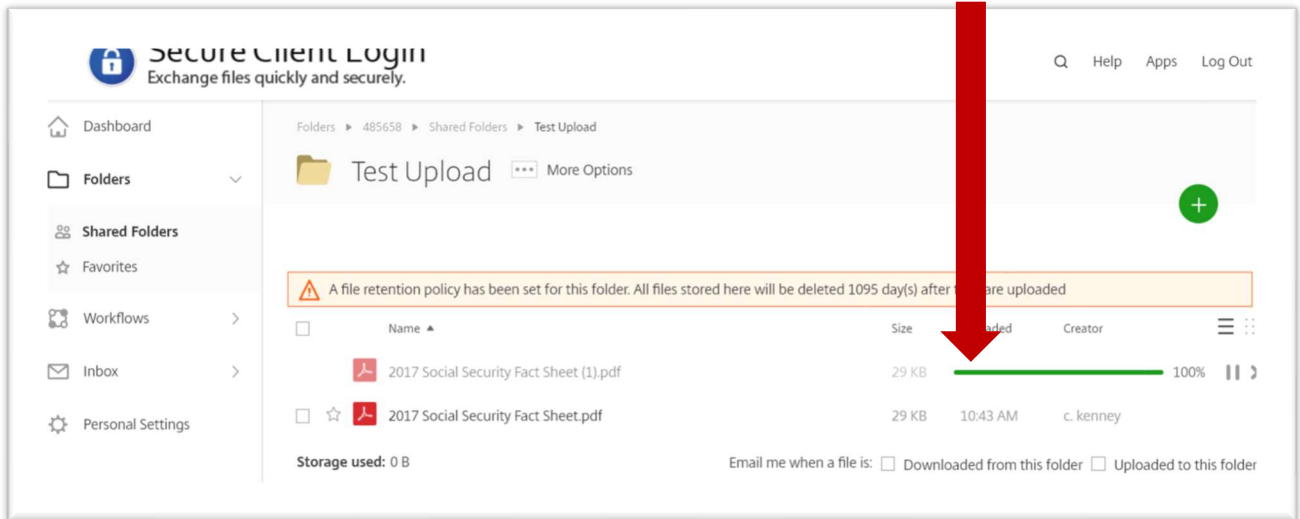
6. The file will appear in the Upload Window



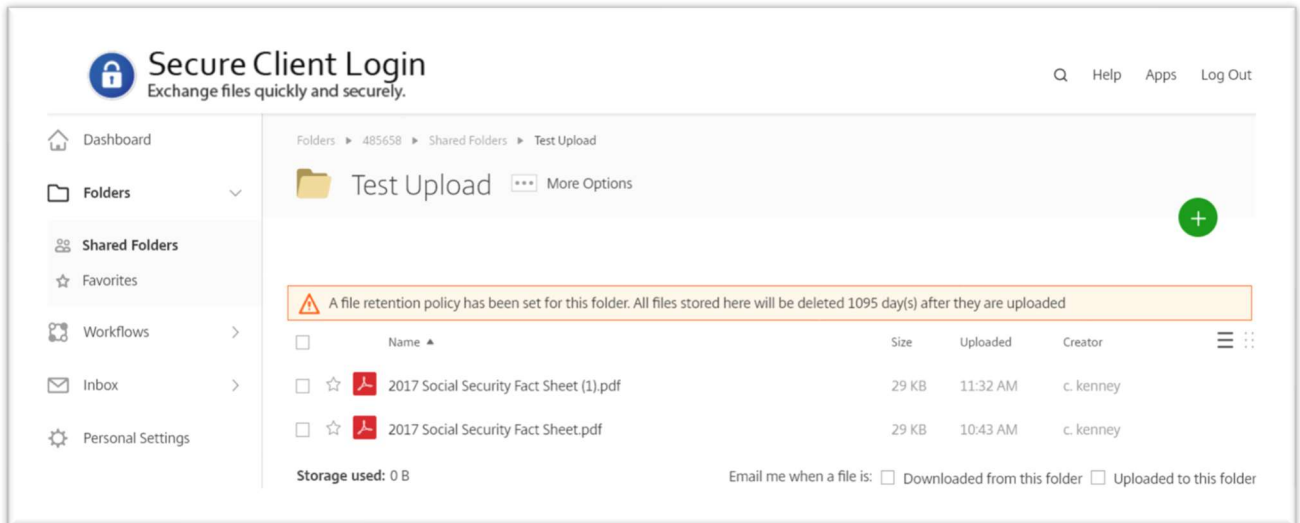
7. If you want to upload additional files, click on **“Add More”** and **repeat steps 4-6**

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