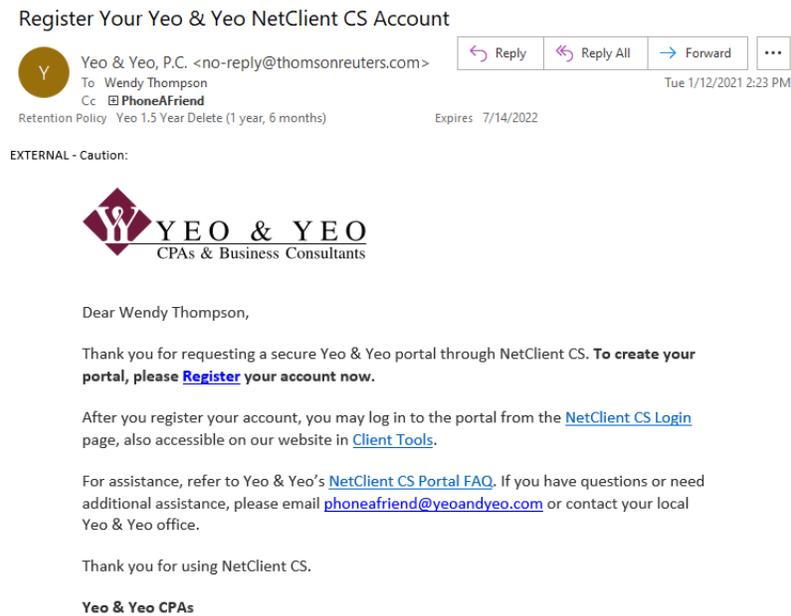


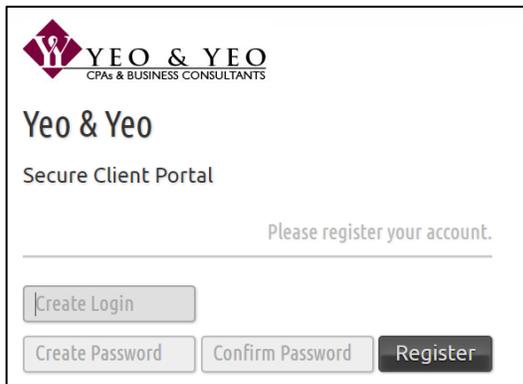
## 1. Welcome to Yeo & Yeo NetClient CS!

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:



Please click on '[Register.](#)'

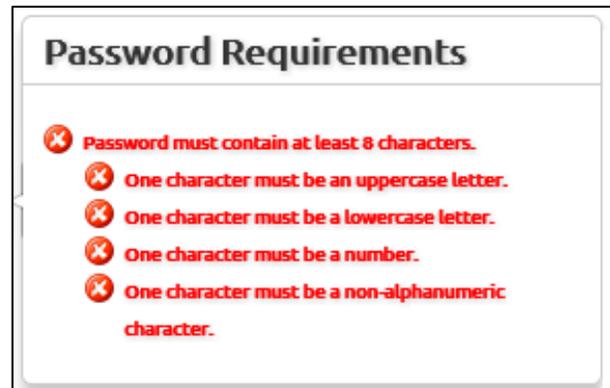
The following web page will open. Please enter your preferred login user ID (your email address is recommended for your user ID) and password, then click 'Register':



  
**YEO & YEO**  
CPAs & BUSINESS CONSULTANTS

**Yeo & Yeo**  
Secure Client Portal

Please register your account.



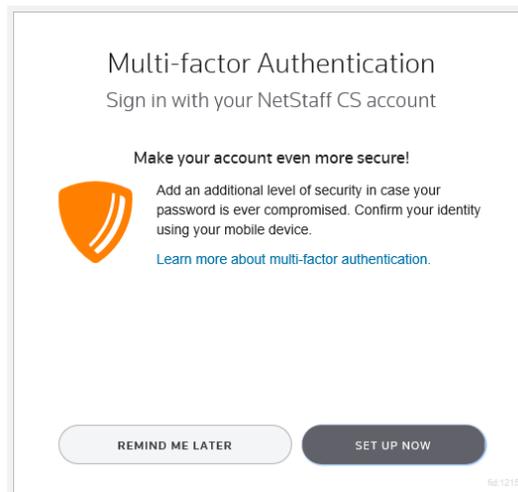
**Password Requirements**

-  Password must contain at least 8 characters.
-  One character must be an uppercase letter.
-  One character must be a lowercase letter.
-  One character must be a number.
-  One character must be a non-alphanumeric character.

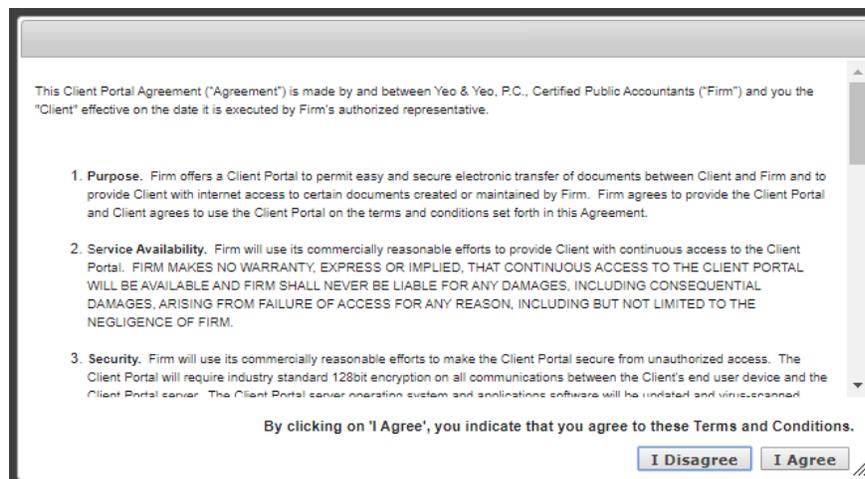
You will then be asked to log in using your registered user ID and password.



You will have the option of setting up multi-factor authentication to make your account more secure.



You will be asked to agree to the client portal agreement 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?**

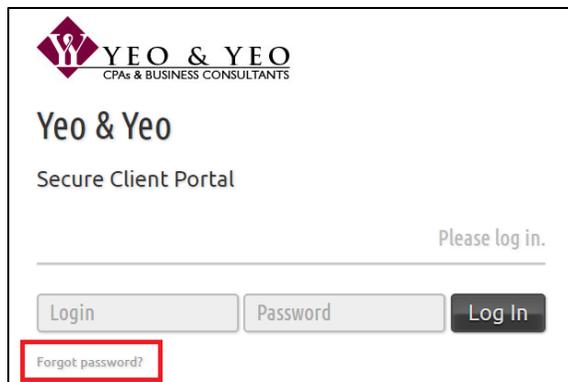
- You can find a link to the NetClient CS login page on our website at [www.yeoandyeo.com](http://www.yeoandyeo.com).
- Click on [Client Portals](#) in the top right corner (located on every page of our site), then click on [Tax, Accounting & Payroll Client Portal Login](#).
- You can also save/bookmark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

**3. What if I forgot my login user ID?**

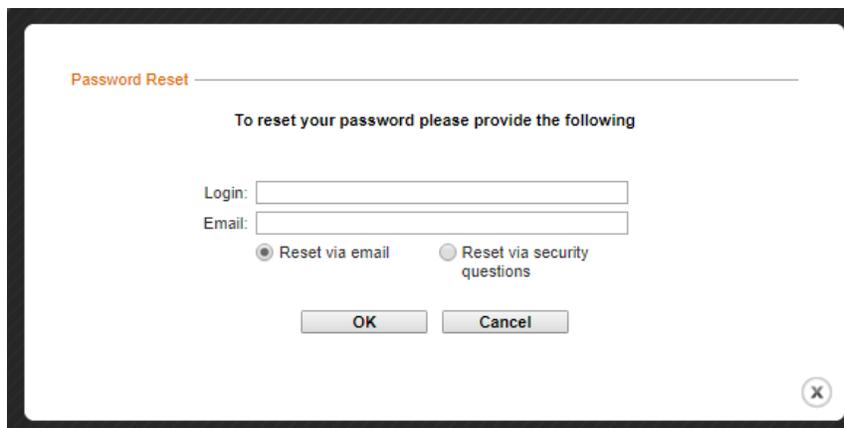
To retrieve your NetClient CS login user ID, you will need to contact your Yeo & Yeo service professional.

**4. What if I forgot my password?**

On the NetClient CS login page, you have the option to click on 'Forgot password?'



You will be asked to enter your login user ID and email address to reset your password:



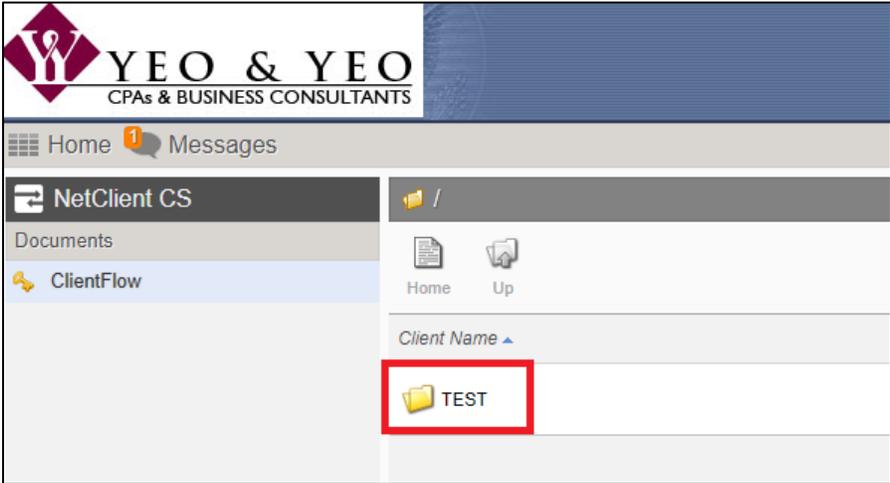
5. How do I upload a document?

Login to your NetClient CS portal account.

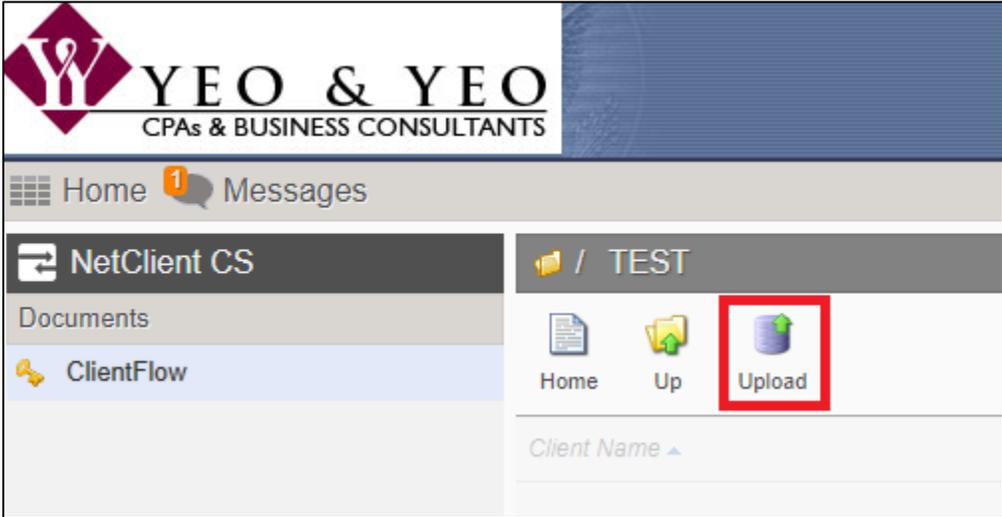
Click on 'ClientFlow' on the left side of the portal screen:



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 on 'Open.'

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



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

When Yeo & Yeo uploads a document to your portal, you will receive a notification email that looks like this:

### \*\*\*Review New Documents Uploaded to Your Yeo & Yeo Client Portal\*\*\*

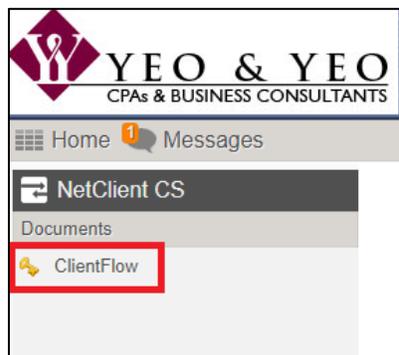
Documents have been uploaded to your Yeo & Yeo [NetClient Portal](#), please [login now](#) to review your documents.

- Any document titled **“government copy”** or **“action required”** contains items that require your attention. Please follow the instructions attached to each of these documents.
- Documents titled **“client copy”** contain copies for your records. These documents should be copied to your permanent storage location as they will be removed from the portal within 12 months.

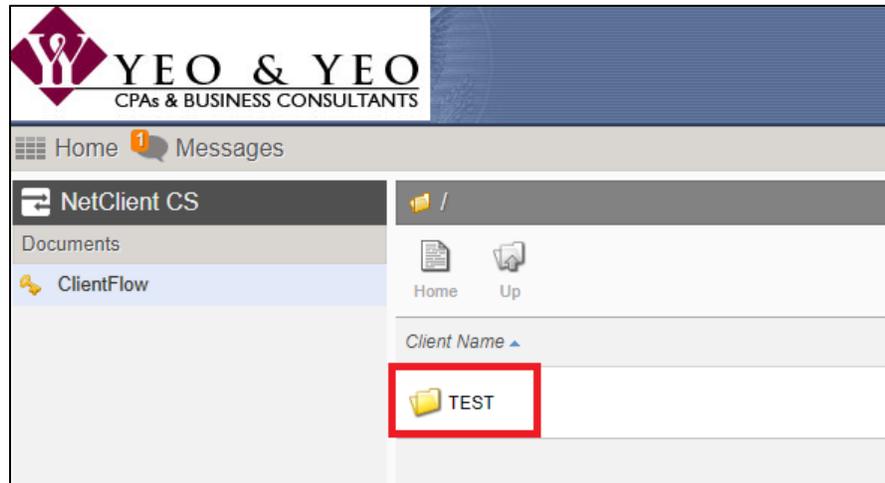
If you have any questions, or need assistance, please contact your Yeo & Yeo professional. If you need assistance with the portal, you may call your local office or refer to [Yeo & Yeo’s NetClient Portal FAQ](#) available on our website under [Client Tools](#).

Login 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 trying to view:



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

**You should address any items labeled “action required” or “government copy.”** These may include payments that need to be addressed or tax returns that need to be signed and mailed. Your e-file authorization may be here as well.

Any document labeled “client copy” should be saved in your records as the portal cannot be used as permanent document storage.

## Frequently Asked Questions / Troubleshooting

### Q: What browsers are supported by the portal?

A: The portal supports Google Chrome, Microsoft Edge, Microsoft Internet Explorer (on Windows 10 and Windows 8.1), and Mozilla Firefox.

- If using a Mac, Chrome or Firefox 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 method of multi-factor authentication is to download the NetClient CS app from the app store on your mobile device. This will push the multi-factor authentication message to your phone for easy access.

The Microsoft authenticator app also works. However, it does not push the message, meaning you must know to open the app to be prompted for multi-factor authentication.

Email and text message codes are not an option at this time, only the apps.

**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?**

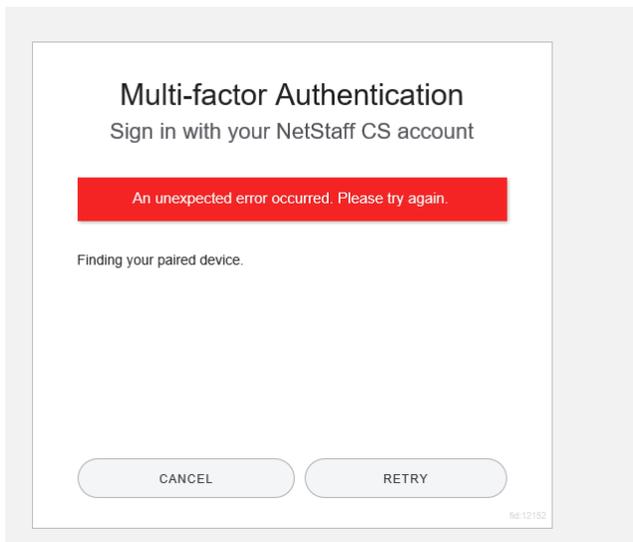
A: The programming of the portal website assumes you have certain additional programs installed and available on your device. This is not necessarily the case, especially with mobile devices. Most computer browsers will open the full PDF for you to view, so you could open it on your computer rather than 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. Note: You may have dual-factor authentication set up for the portal and the authenticator app on the same mobile device. In that case, once you log into the NetClient CS app, it will open the authenticator app and automatically authenticate you without you tapping on any approval.

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



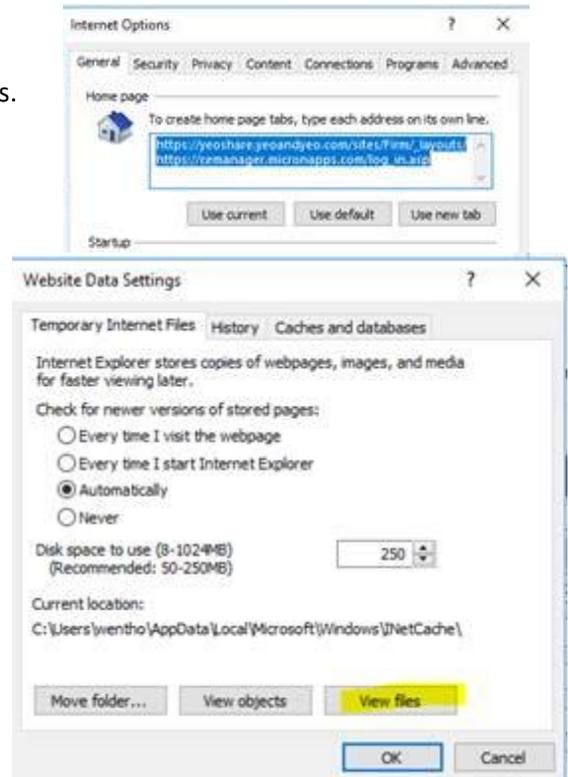
A: Multiple things may work, depending on the exact situation.

- a. First, click the retry button in the message and try logging in again. DO NOT refresh the page or otherwise, reload the page, click retry and try again. (Reloading the page will cause you to get the error again, whereas retry may not.)
- b. If that does not work, close out of the browser you were in. Open a different browser. (If you were in Chrome, try Internet Explorer, 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.
- c. We have had some success closing out of all programs, restarting the machine, and trying again.

- d. If none of those work, you will need to 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.

*For Internet Explorer:*

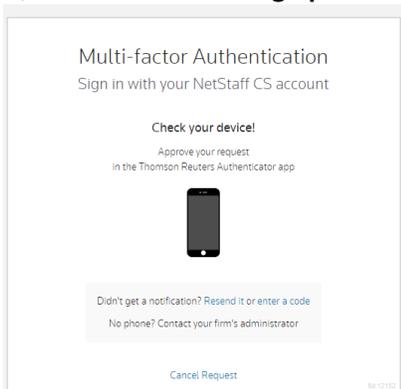
- i. In Internet Explorer, choose Tools  > Internet Options.
- ii. Under browsing history, click Settings.
- iii. Click to View files.
- iv. Select and delete all the files in this directory.
- v. Close and reopen Internet Explorer.
- vi. Login to portal.



**Q: I set up Multi-factor authentication. Now I cannot get it to work, what should I do?**

A: Contact your professional at Yeo & Yeo. Once they have verified it is, in fact, you requesting help, they will have one of the Administrative Assistants get back to you with a temporary code that will work for only 24 hours.

**Q: I don’t recall setting up Multi-factor authentication, but it tells me to check my device. What should I do?**



A: Contact your professional at Yeo & Yeo. Once they have verified it is, in fact, you requesting help, they will have one of the Administrative Assistants get back to you with a temporary code to enter in where it says “enter a code” that will work for only 24 hours.

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