

Registering for Net Client Portal

1. Once the office has set you up on the portal you should receive an email asking you to register for access to the NetClient Portal

Dear Lauren Hubert,

We are writing to inform you of an option that our firm has made available to you in the coming year.

In order to better serve you we have invested in a new secure web portal that will enable us make your information more accessible to you as well as be more environmentally friendly.

Our NetClient CS Portal will allow you to access your information 24 hours a day 7 days a week. This system will also allow you to exchange files with us as well to view and print tax documents. We also have the ability to do day-to-day bookkeeping, accounts receivables (invoicing and statements), accounts payable (enter and pay bills), payroll, and real time accounting.

This Portal has a comprehensive password system that will provide you with worry free access to all of your important documents, and with 256-bit encryption protection your data is safe.



Please [Register](#) your account.

After you register your account, you can log in from the NetClient CS [Login](#) page.

If you have any questions please do not hesitate to call our office at 706- 288-2000

Thank you for using NetClient CS.

2. Click Register
3. You will then be directed to set up your username and password

Welcome

Please register your account.

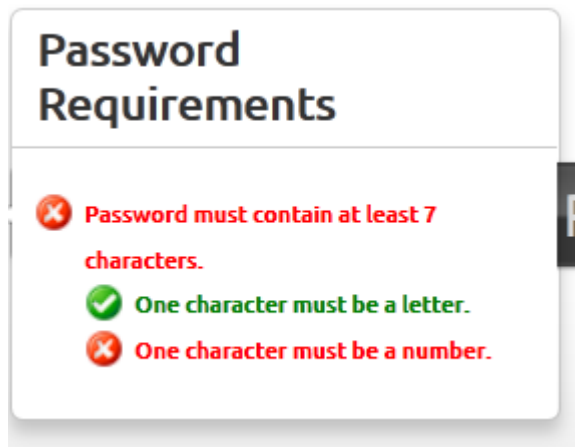
Create Login

Create Password

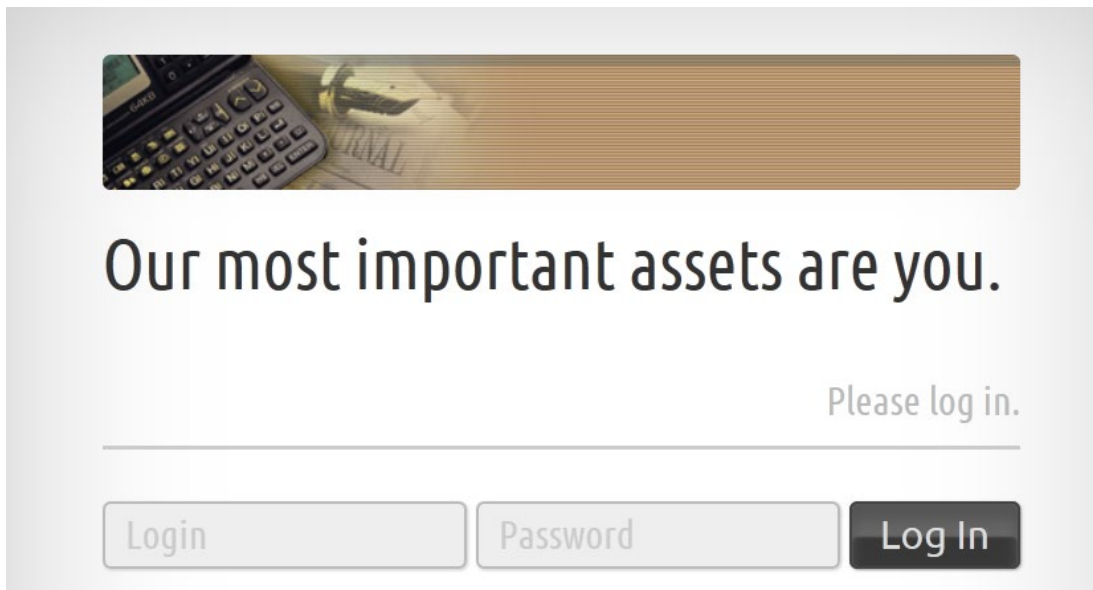
Confirm Password

Register

4. Your password will ask you to use the following in your password set up

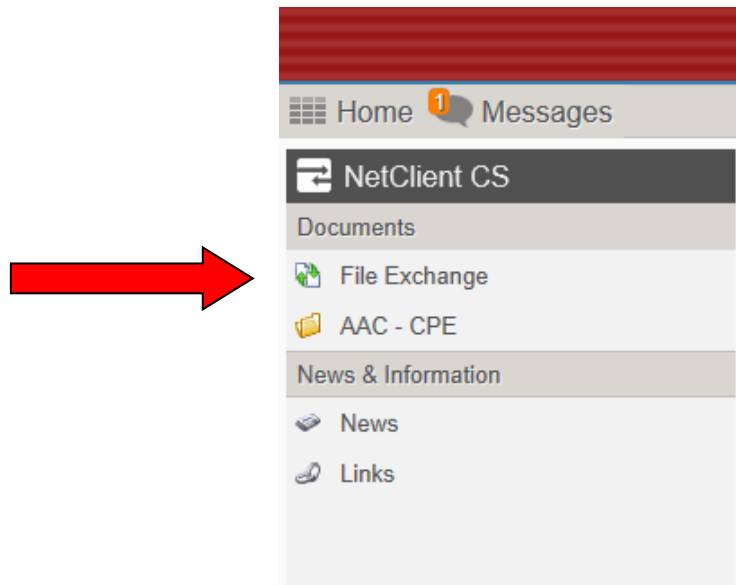


5. It will then indicate that your account has been set up and you must then log in

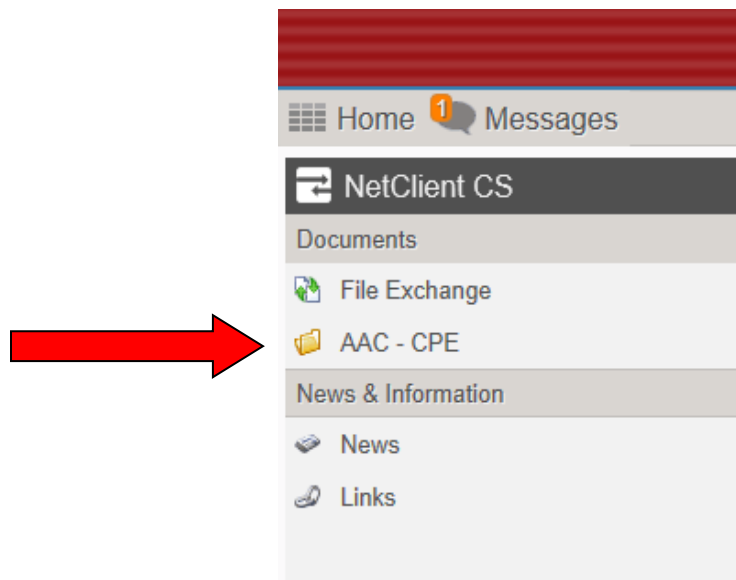


6. You will then be logged in. The software will prompt you to answer some security questions for additional security measures.
- If you ever wish to change or update your password, you may do so on the main screen once you have logged in.
 - If you ever forget your password, you can call the office and we can give you a temporary password to use; once logged in you will be able to change your password.

7. To upload or download files you will need to go file exchange



8. To view documents that have been uploaded by the firm to you, click on the file displayed to the left of the screen (this will be your name and/or your business name)



9. Once you have clicked on your file (your name/business name) you will then see a folder called Lacerte Tax Return-client, click this and you will be able to view any document that the firm has uploaded to you.

Instructions for logging onto Net Client CS portal

1. Go to our website www.augustacpas.com
2. On the top menu bar, click on Client Login
3. Enter your username and password.
 - a. If you ever wish to change or update your password, you may do so on the main screen once you have logged in.
 - b. If you ever forget your password, you can call the office and we can give you a temporary password to use; once logged in you will be able to change your password.
4. Once logged in, click your name on the left side (your name/business name)
5. Click on the folder, Lacerte Tax Returns – Clients – This will be the place you find any documents that we have uploaded to you.