

MHTB Accountancy Group of Silicon Valley

NetClient CS Secure Portal Instructions

Welcome to MHTB's new NetClient CS secure portal! In a continual effort to offer our clients value and security we have invested in a new client portal that will allow you to upload and receive documents. Below is a quick guide on how to get registered.

1. Once our administrative staff has created a portal using your email address as the user ID, you will receive an email notification:



Dear Jane,

Welcome to your MHTB Accountancy Group of Silicon Valley Secure Client Portal. Here you will be able to view documents, upload important tax documents and perform other important tasks. When documents are ready for your review you will receive an email notification. To complete your account activation, please click the register link below. You will be asked to choose a username and password.

[Register](#) 

After you register your account, you can log in from the [Login](#) page. You can also access your secure online account on our convenient mobile app.

[Click here to download the iOS mobile app](#)

[Click here to download the Android mobile app](#)

Thank you for using the MHTB Accountancy Group of Silicon Valley Secure Client Portal!

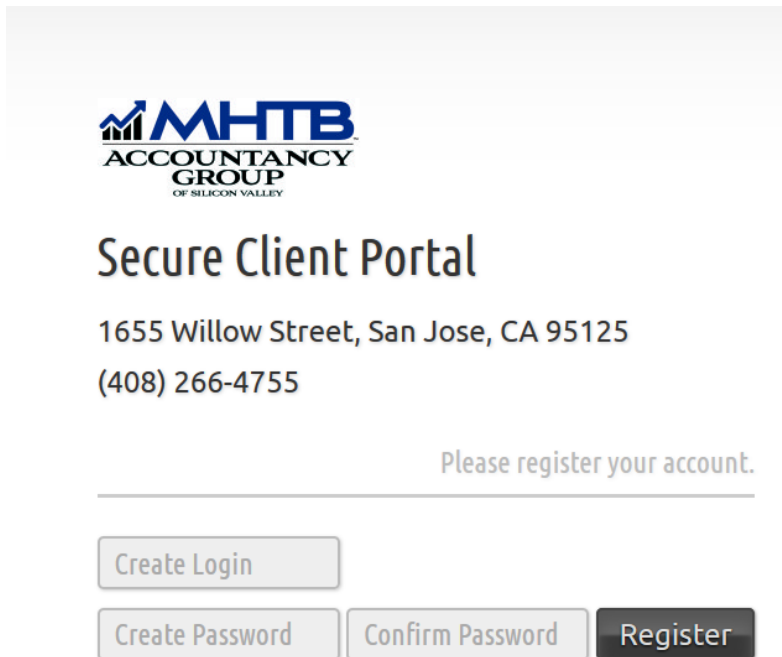
MHTB Accountancy Group of Silicon Valley
1655 Willow St
San Jose, CA 95125

Phone: [\(408\) 266-4755](tel:(408)266-4755)
Fax: [\(408\) 266-0825](tel:(408)266-0825)

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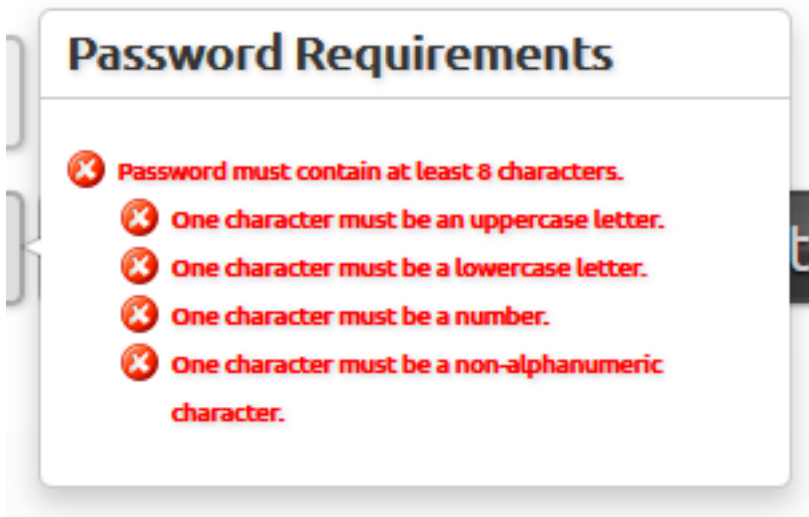
In the body of the email, above, click on [Register](#).

2. Clicking [Register](#) will open up your web browser to the following page:



The screenshot shows the registration page for the MHTB Accountancy Group. At the top left is the logo for MHTB Accountancy Group of Silicon Valley. Below the logo is the title "Secure Client Portal" and the address "1655 Willow Street, San Jose, CA 95125" and phone number "(408) 266-4755". A horizontal line separates the header from the registration instructions, which read "Please register your account." Below this are four buttons: "Create Login", "Create Password", "Confirm Password", and "Register". The "Register" button is highlighted in dark grey.

3. You will now create a new Login and password. Please make note there are several password requirements when creating your password:



The screenshot shows a dialog box titled "Password Requirements". It contains a list of five requirements, each preceded by a red 'X' icon:

- ✘ 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.


Once all requirements have been met you will see the following:

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.

Confirm your password once more and click Register. You will now see your login screen with your Login ID pre-populated. **Allow the portal 1-2 minutes to sync with our systems before logging in.** If you log in immediately, you will get an error message stating you have an invalid login. Clicking on the refresh button in your browser is also recommended.

- Bookmark page www.netlinksolution.com



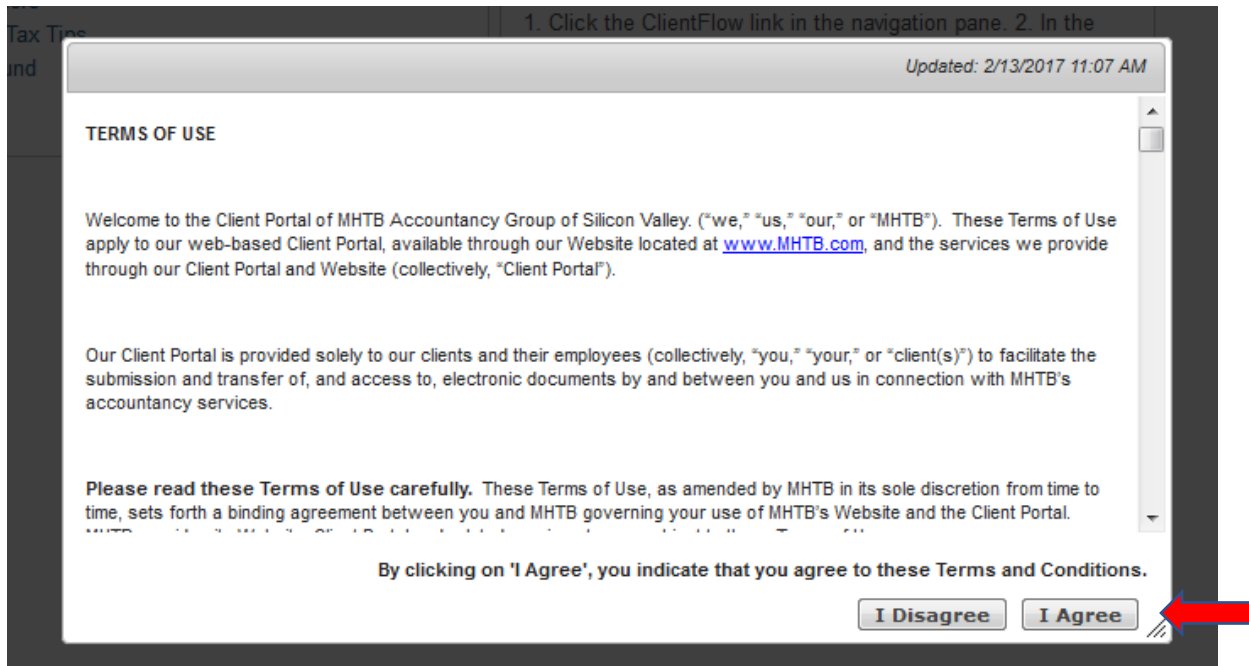
Secure Client Portal

1655 Willow Street, San Jose, CA 95125
(408) 266-4755

Please log in.

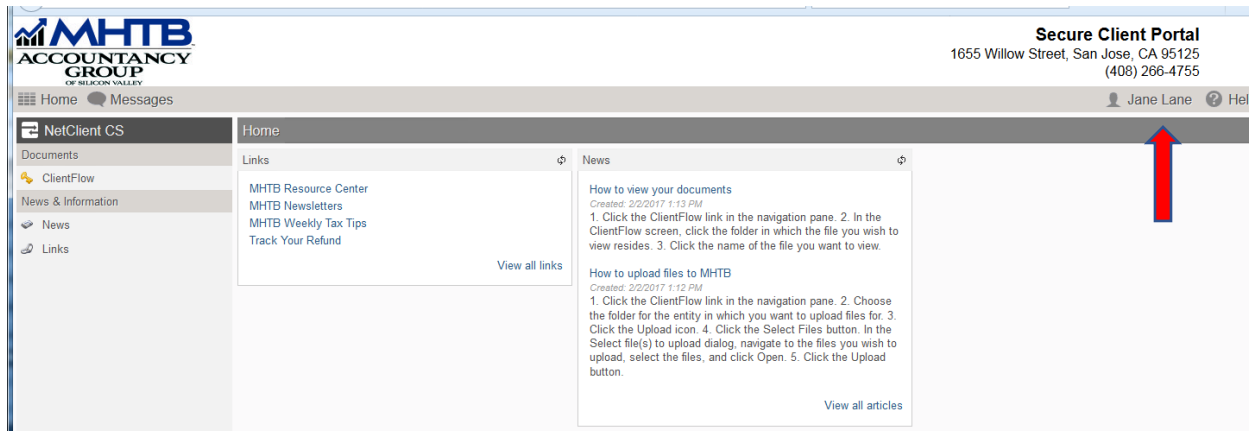
[Forgot password?](#)

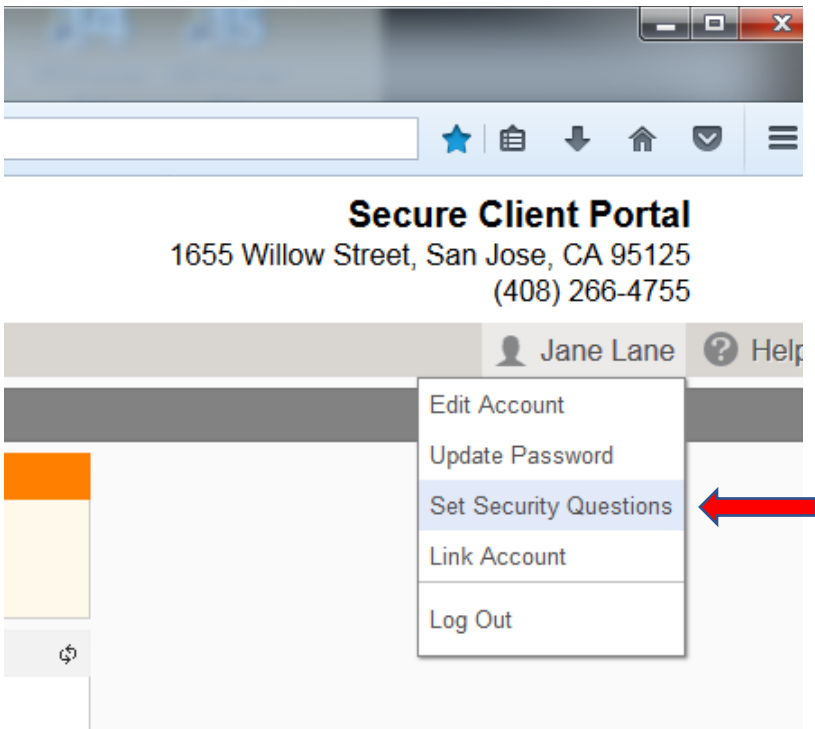
4. After logging in, you will see our MHTB portal TERMS OF USE that must be agreed to in order to proceed:



Once the Terms of Use have been reviewed, click "I Agree," and you will now see your client dashboard.

5. Setting up security questions: In the upper right hand corner, click on your name and set-up your security questions in the event you forget your password. (This step is not required, but recommended)

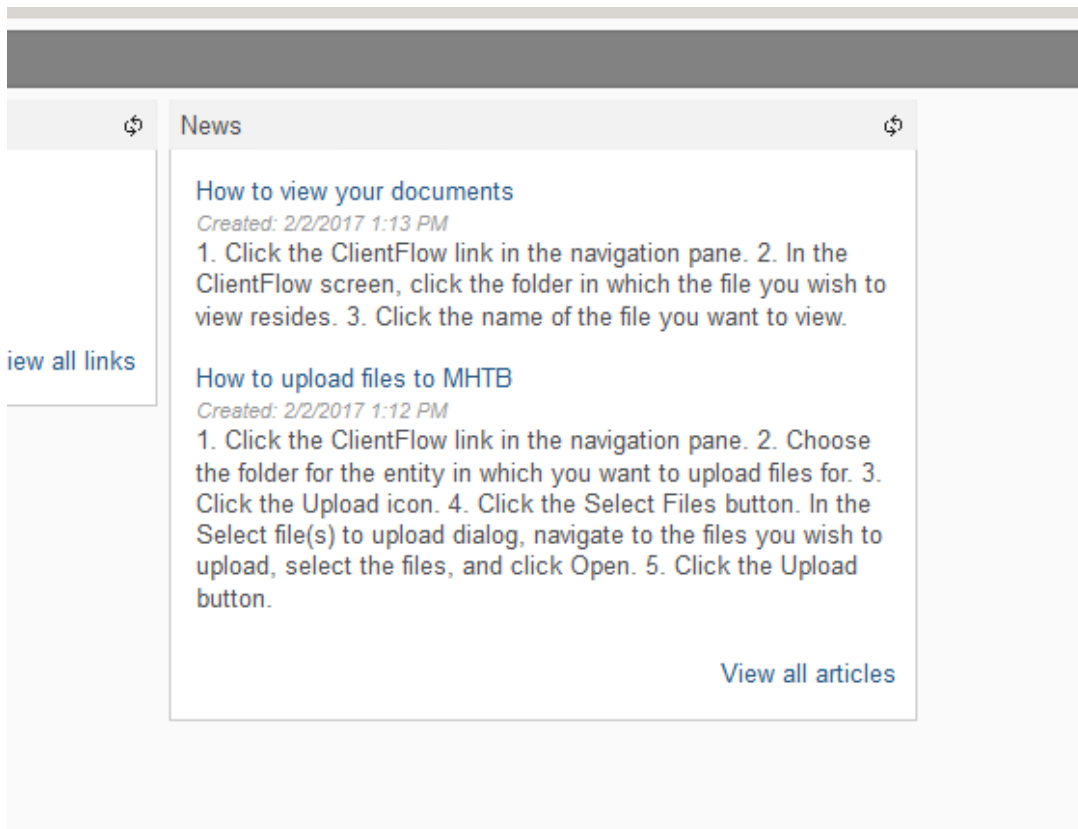




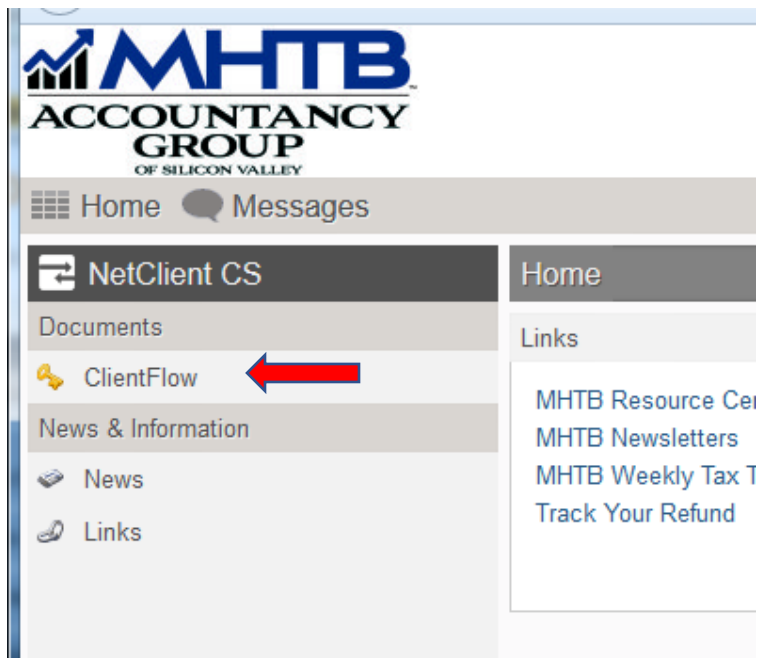
You will be asked a series of questions to complete. Once you are done, click OK.

A screenshot of a 'Personal Security Questions' dialog box. The title is 'Personal Security Questions'. Below the title, it says 'Please select your personal security questions and answers'. There are four questions, each with a dropdown menu and a text input field for the answer. Question 1: 'Which city were you born in?' with the answer 'Merced'. Question 2: 'Please choose a security question...'. Question 3: 'Please choose a security question...'. Question 4: 'Please choose a security question...'. At the bottom, there are 'OK' and 'Cancel' buttons. A close button (X) is in the bottom right corner.

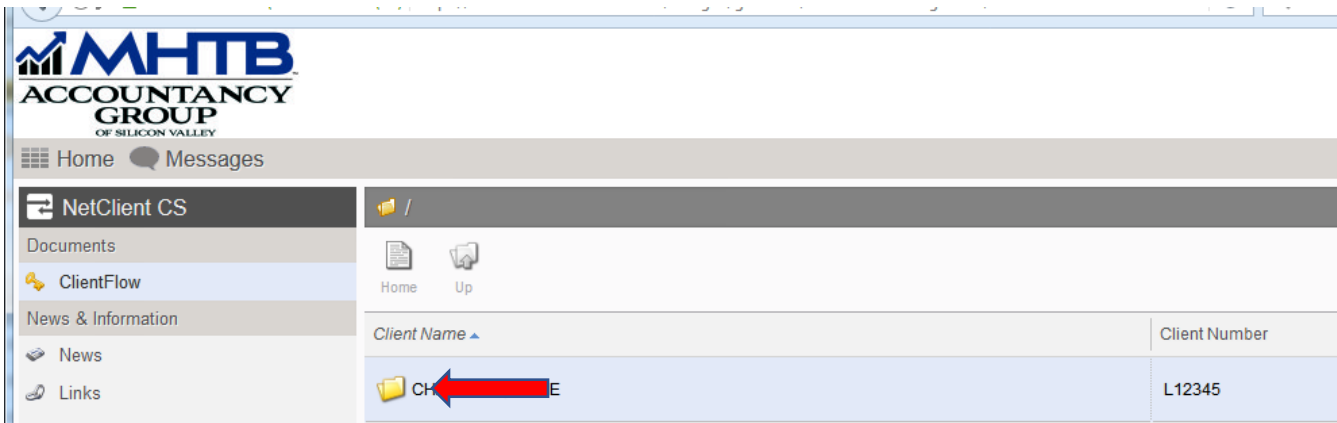
6. On your client dashboard you will see step-by-step instructions on “How to view your documents” and “How to upload files to MHTB.”



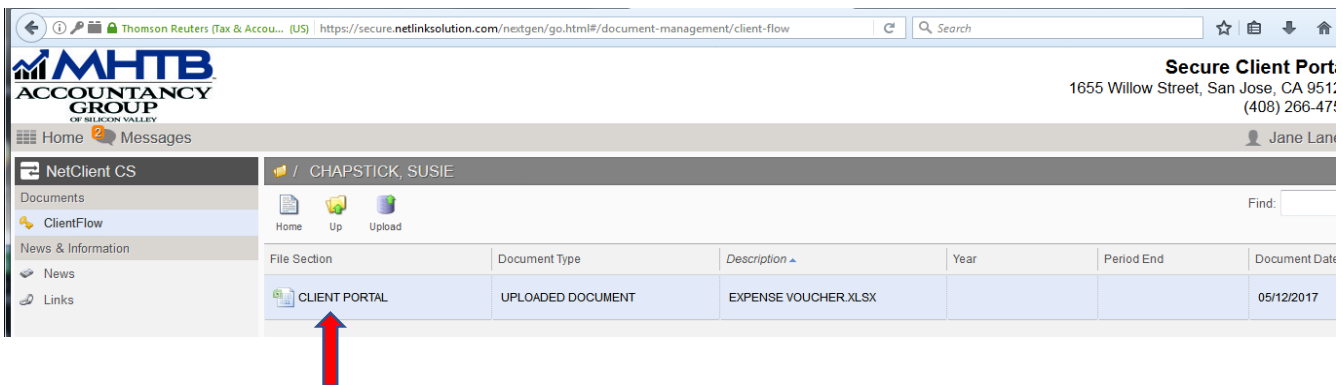
a. Click the ClientFlow link in the navigation pane



b. In the ClientFlow screen, click the folder to view your files. If you have multiple client accounts, each account will have a separate folder.



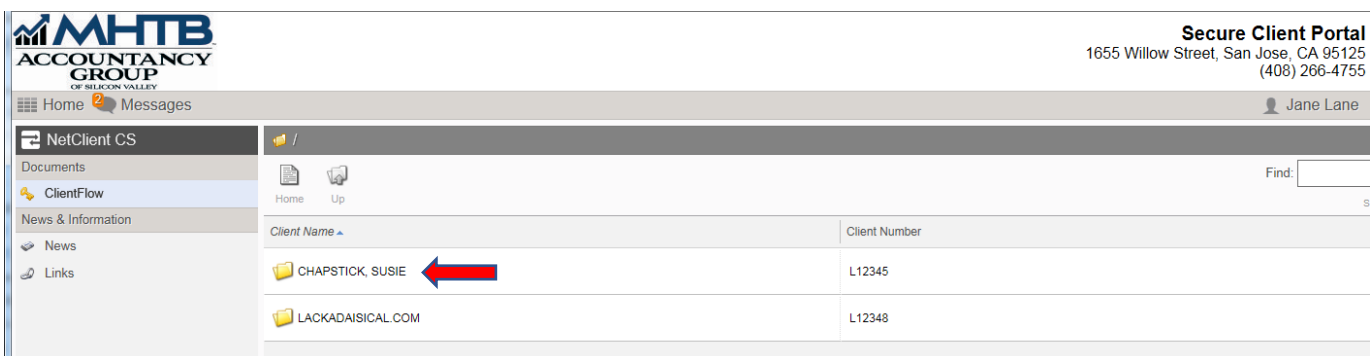
c. Click the name of the file you want to view.



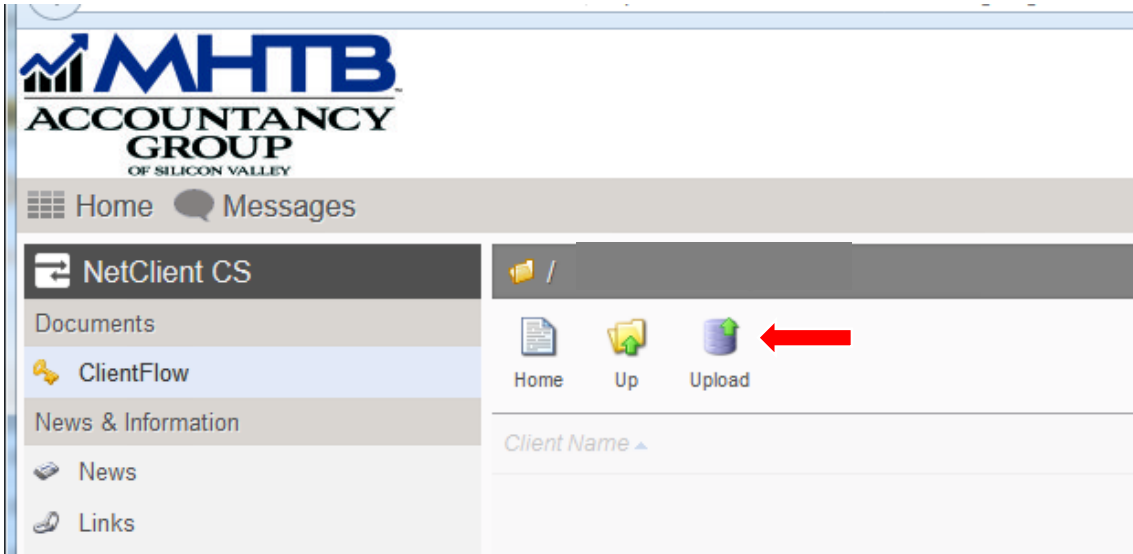
After opening the file you can print or save to your computer.

7. Uploading documents:

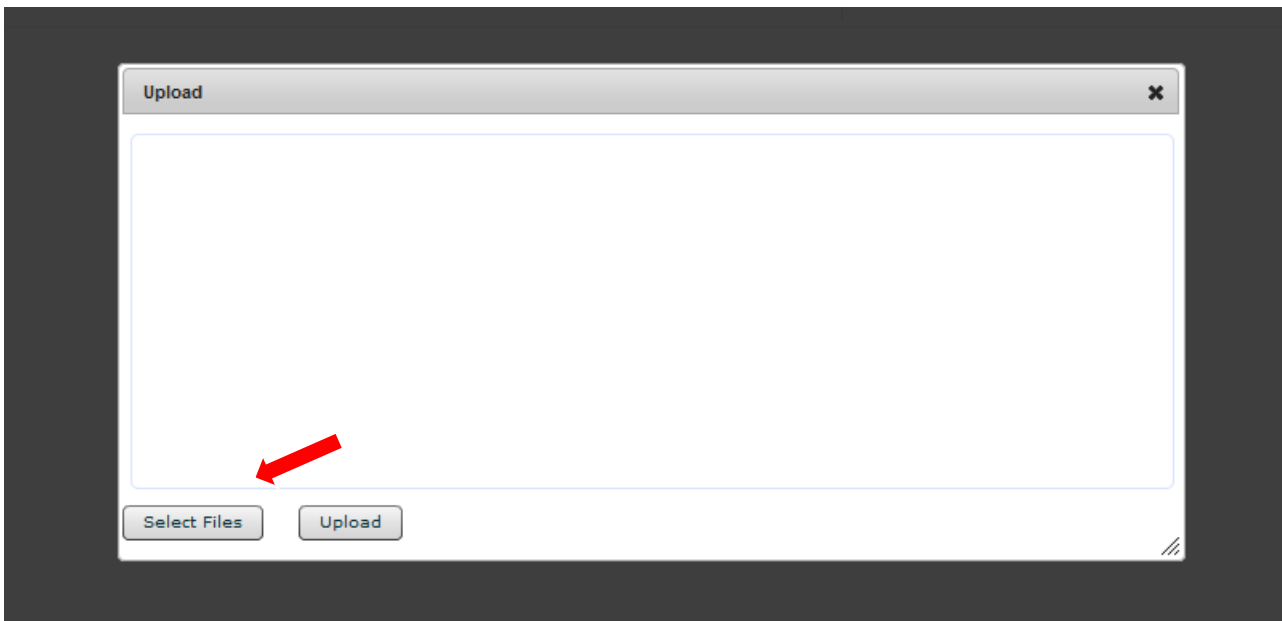
- Select the folder you want to upload files to. If you have multiple account folders make sure you select the correct folder to upload files to.



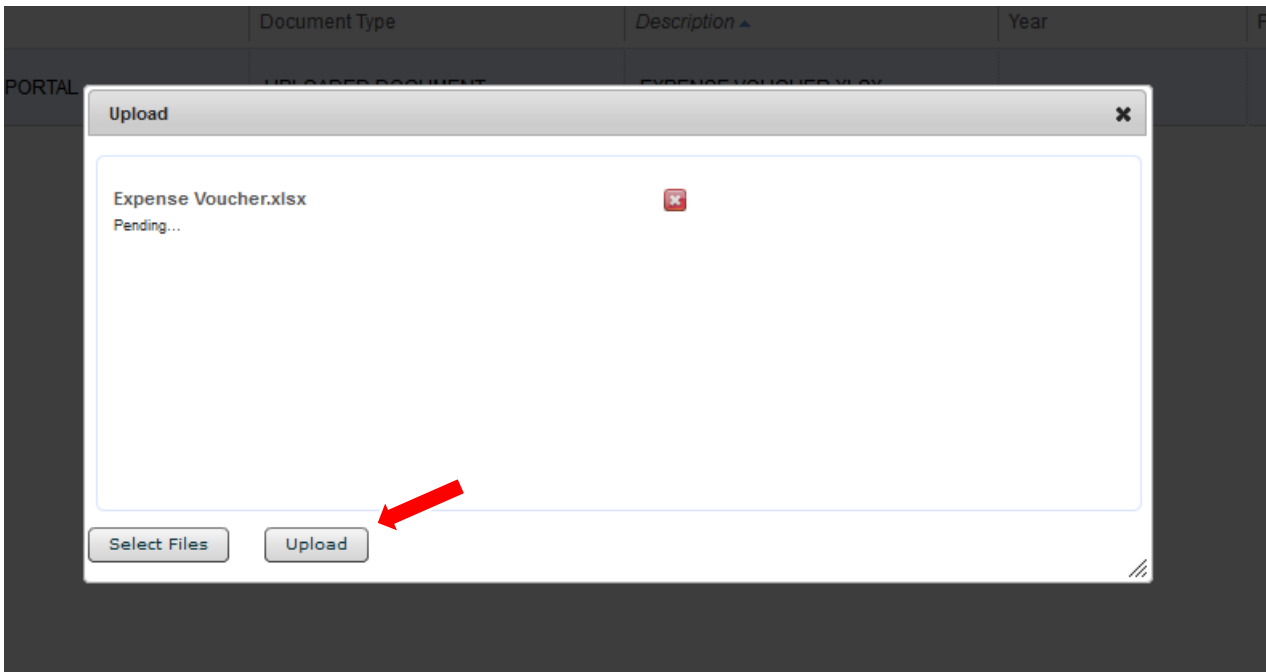
a. Click the Upload icon.



b. Click the Select Files button. In the Select file(s) to upload dialog, navigate to the files you wish to upload, select the files, and click Open.

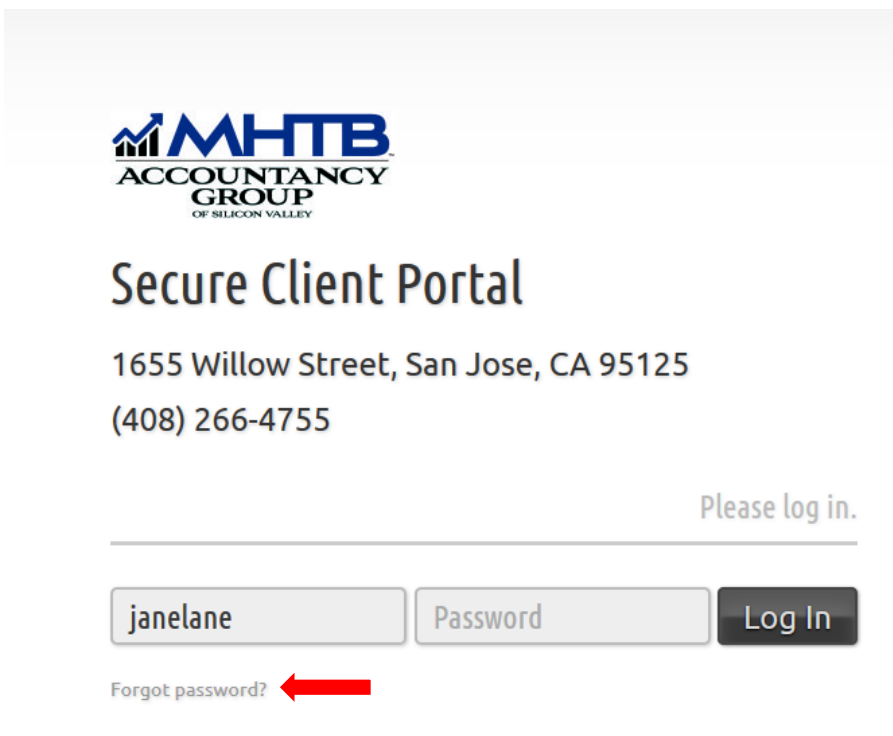


c. Click the Upload button

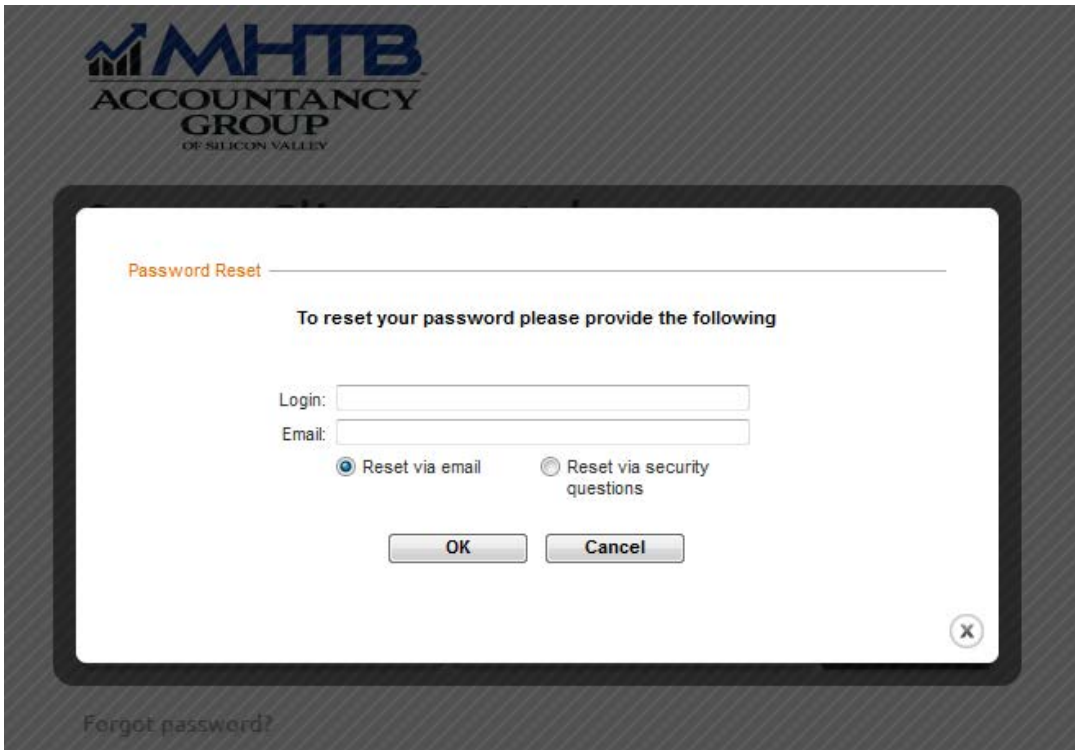


8. Resetting Password:

In the event you forget your password you have the option to reset it – click the link “Forgot Password.”



You can reset your password via email or security questions if you set those up during your initial login. If not, you will need to reset via email.



The image shows a screenshot of a web application interface for MHTB Accountancy Group. At the top left, the logo for MHTB Accountancy Group of Silicon Valley is displayed. Below the logo, there is a dark grey background with a white dialog box titled "Password Reset". The dialog box contains the following elements: a title "Password Reset", a subtitle "To reset your password please provide the following", two input fields labeled "Login:" and "Email:", two radio buttons for "Reset via email" (which is selected) and "Reset via security questions", and two buttons labeled "OK" and "Cancel". A close button (X) is located in the bottom right corner of the dialog box. At the bottom left of the dark grey background, there is a link that says "Forgot password?".

If you're still having trouble resetting the password, please contact MHTB to have the password manually reset.