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:

MHTB ACCOUNTANCY GROUP OF SILICON VALLEY

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

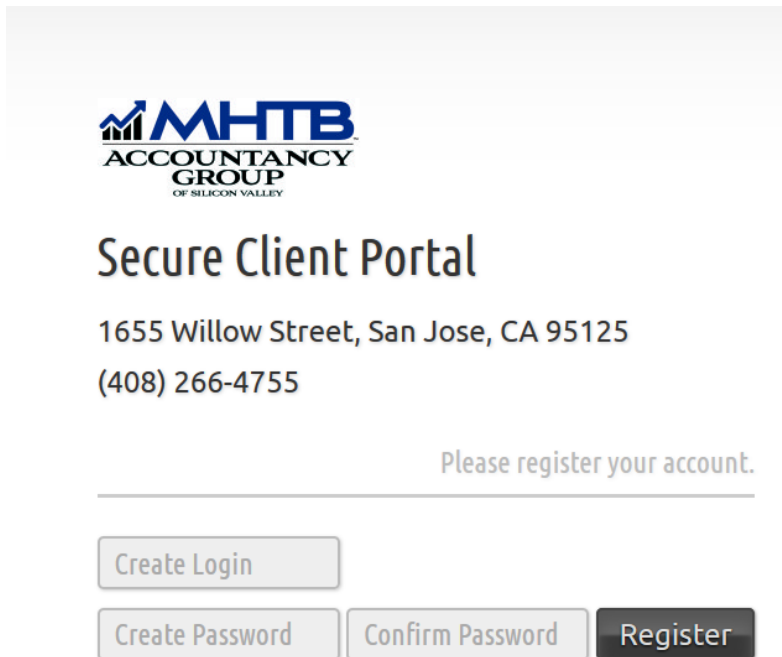Thank you for using the MHTB Accountancy Group of Silicon Valley Secure Client Portal!

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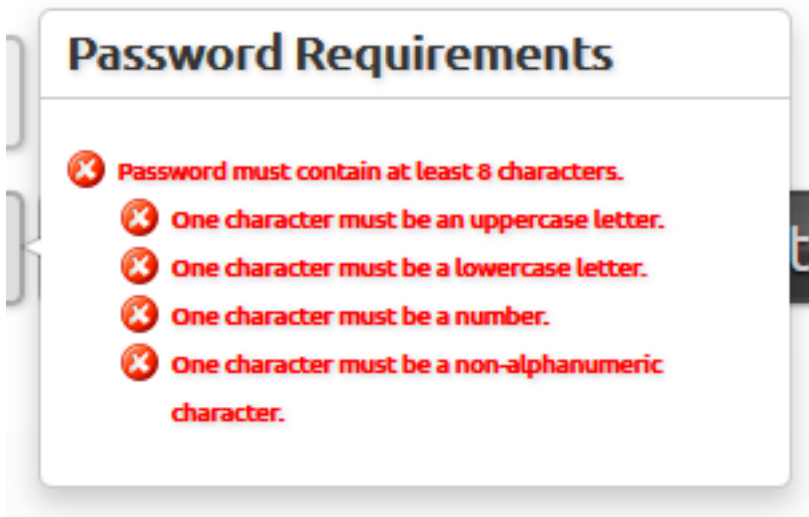1655 Willow St
San Jose, CA 95125

Phone: (408) 266-4755
Fax: (408) 266-0825

In the body of the email, above, click on Register.

2. Clicking Register will open up your web browser to the following page:

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Secure Client Portal

1655 Willow Street, San Jose, CA 95125

(408) 266-4755

Please register your account.

Create Login

Create Password	Confirm Password	Register

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

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.

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.
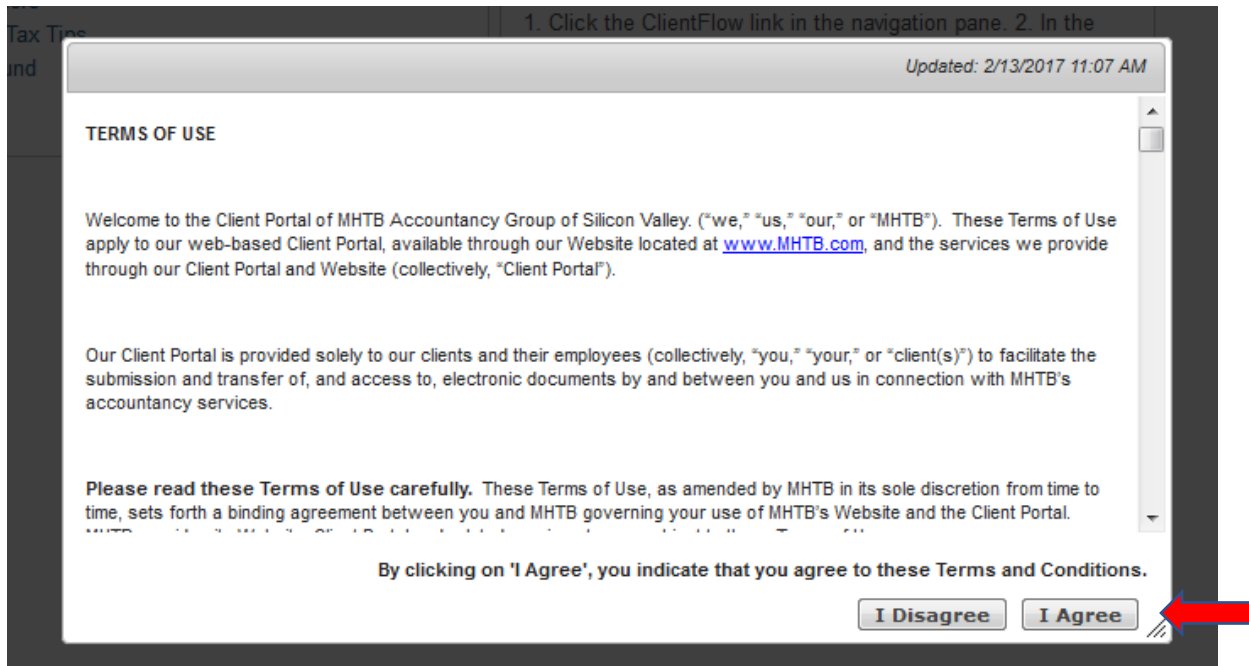
- Bookmark page www.netlinksolution.com

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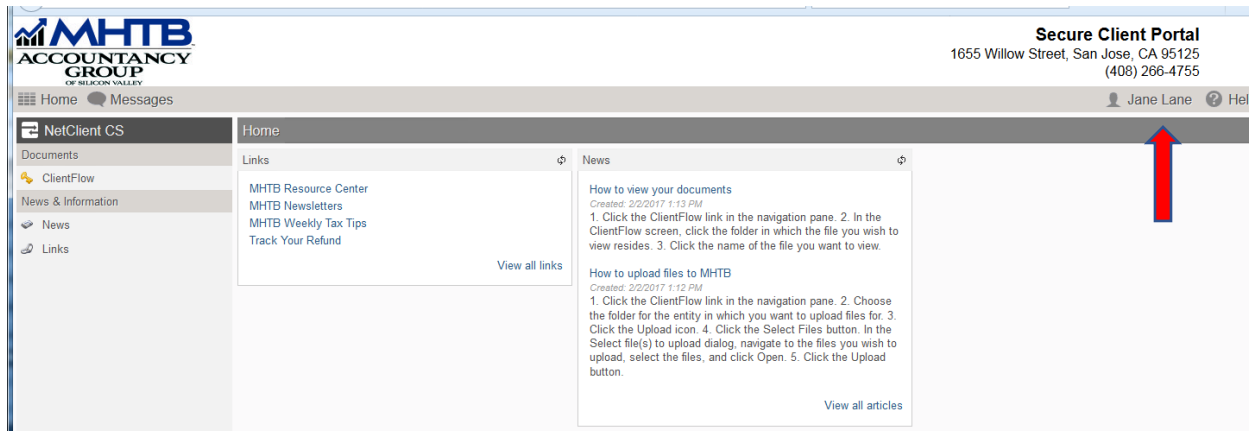(408) 266-4755

Please log in.

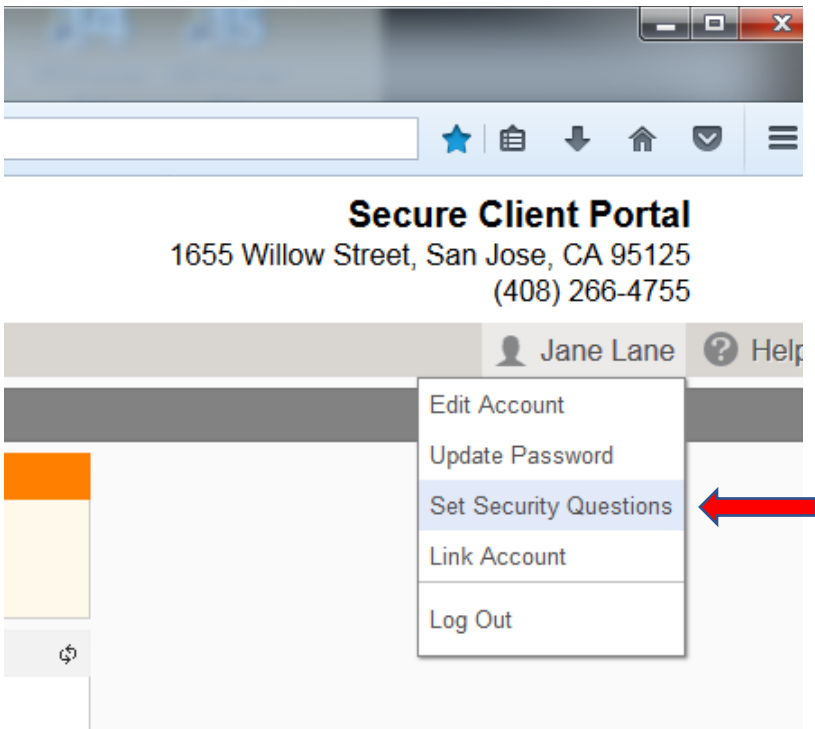| janelane | Password | Log In |

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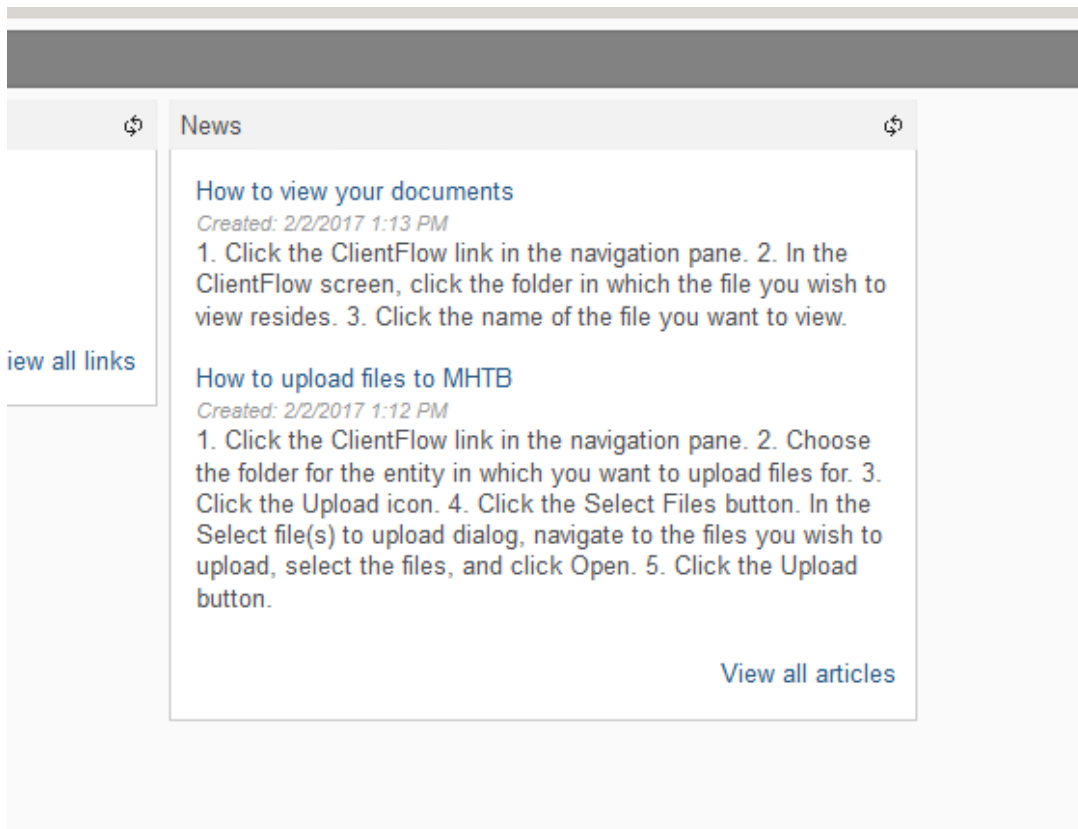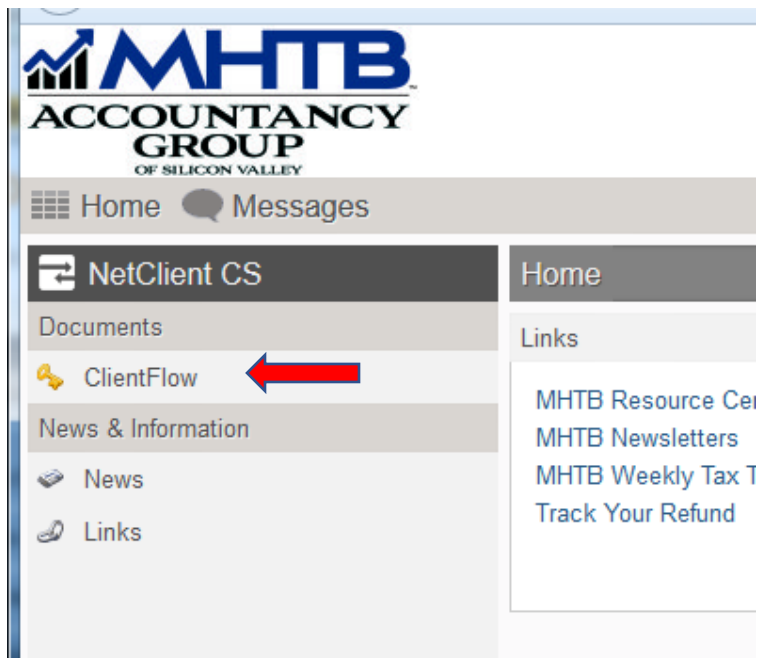
You will be asked a series of questions to complete. Once you are done, click OK.

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."

News

How to view your documents
Created: 2/2/2017 1:13 PM
1. Click the ClientFlow link in the navigation pane. 2. In the ClientFlow screen, click the folder in which the file you wish to view resides. 3. Click the name of the file you want to view.

How to upload files to MHTB
Created: 2/2/2017 1:12 PM
1. Click the ClientFlow link in the navigation pane. 2. Choose the folder for the entity in which you want to upload files for. 3. Click the Upload icon. 4. 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. 5. Click the Upload button.
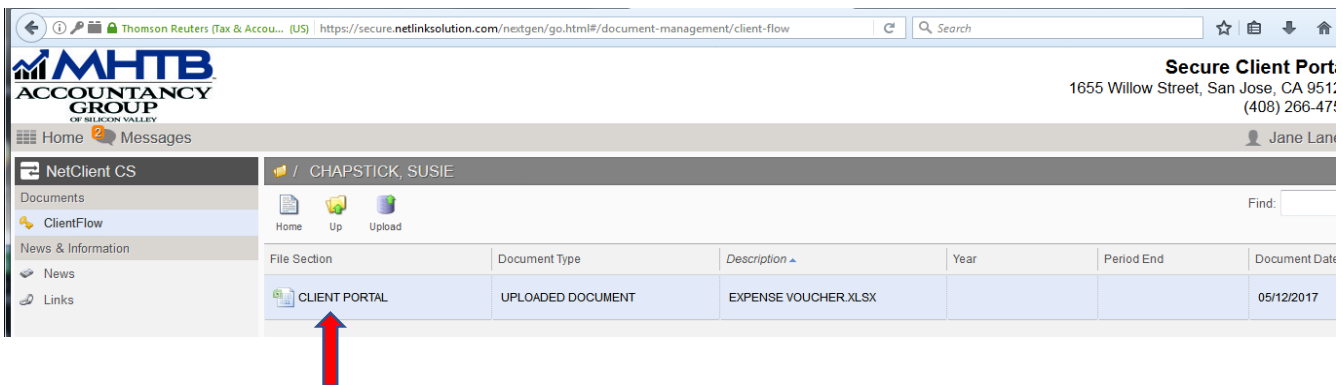
View all articles

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.
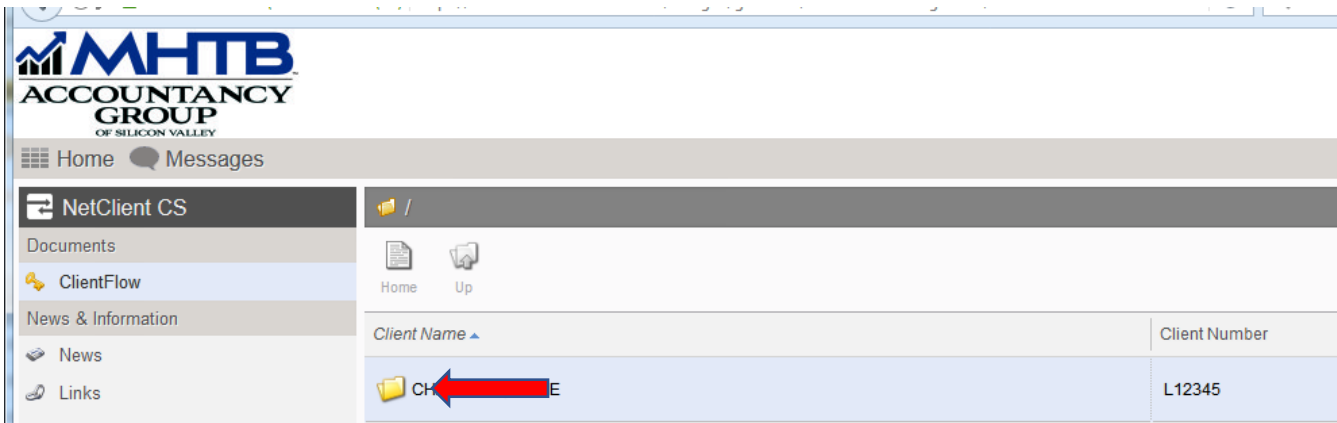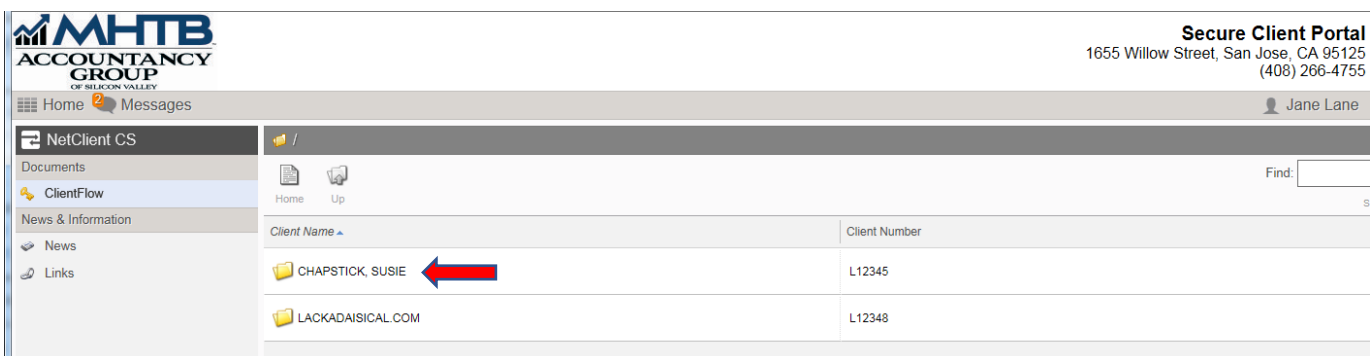

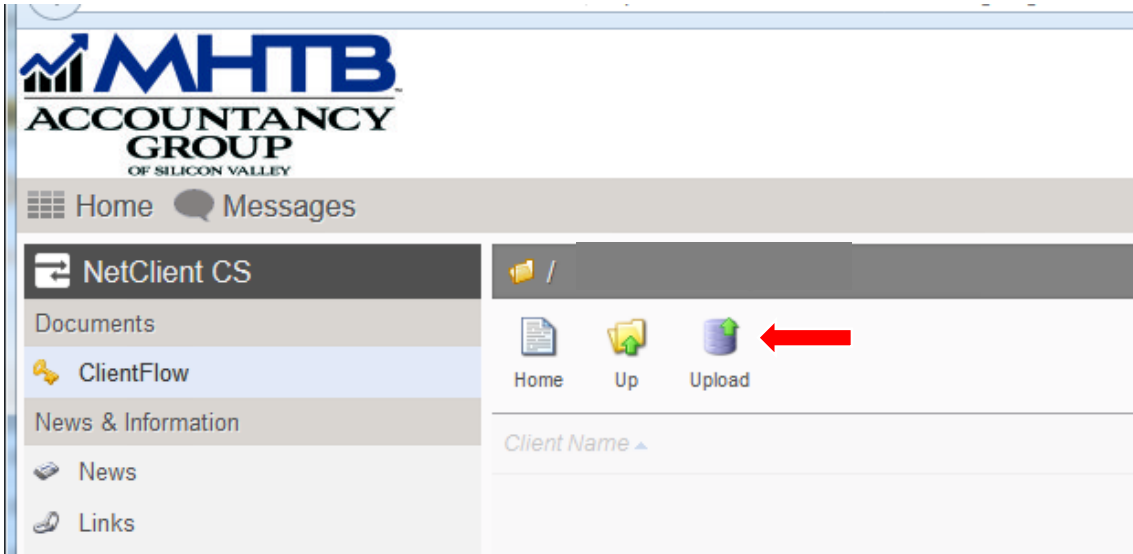c. Click the name of the file you want to view.

After opening the file you can print or save to your computer.
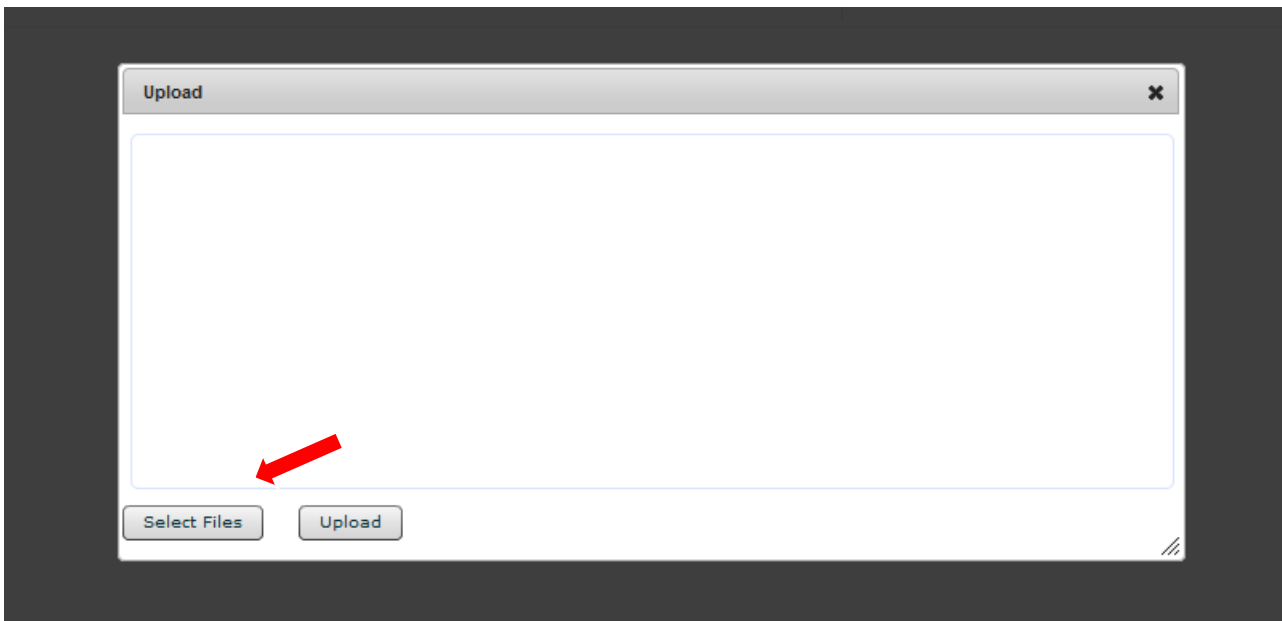
7. Uploading documents:

- 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.
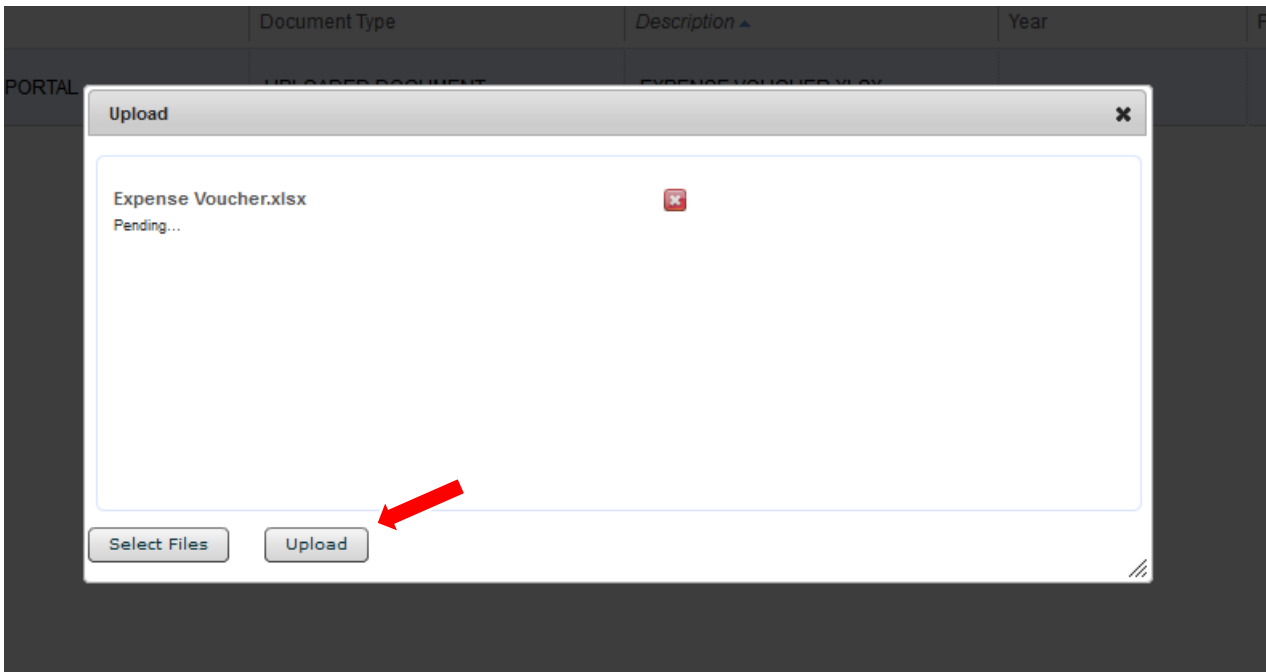
a. Click the Upload icon.

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.
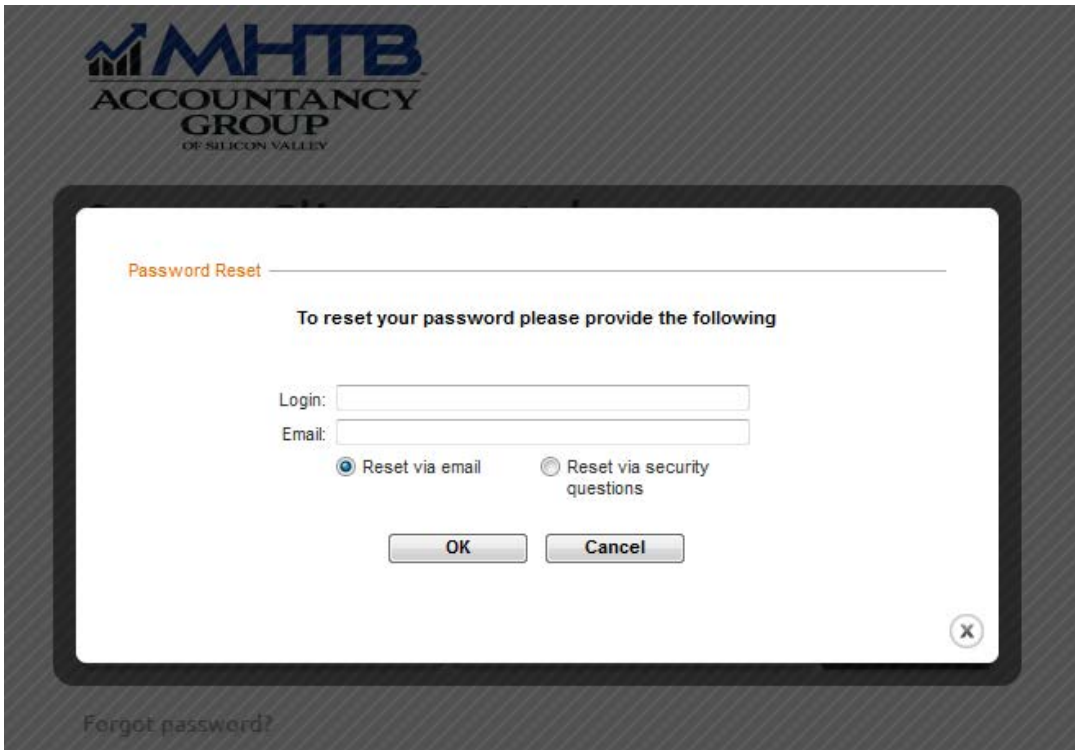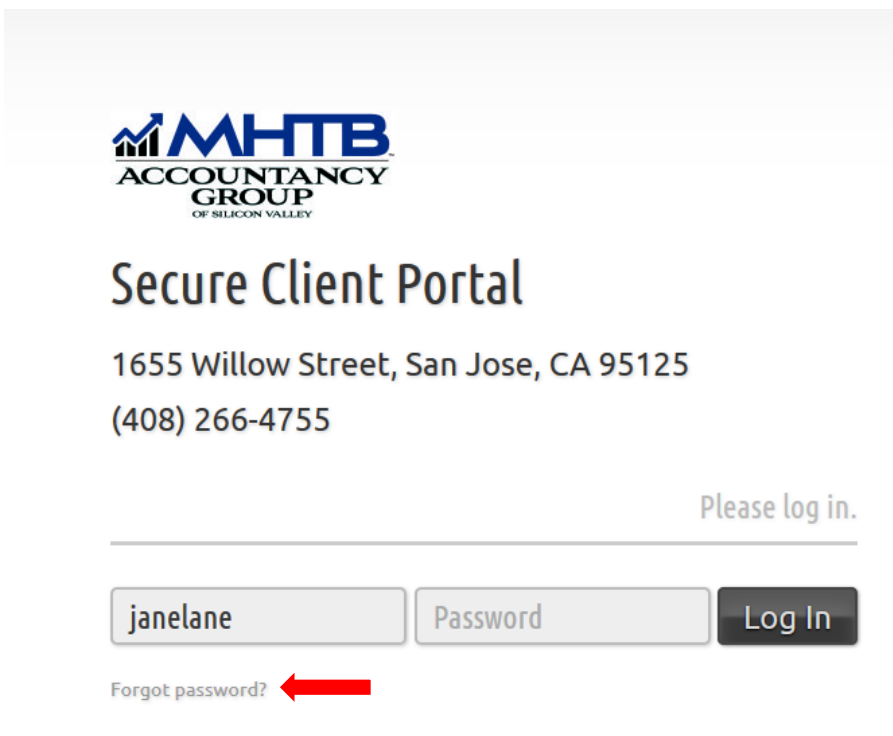
c. Click the Upload button

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.

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