GUIDE TO USING YOUR CLIENT PORTAL

Our Client Portal system is the safest and easiest way to send documents to us and receive documents from us. We've answered some general questions below about using our Client Portal system.

If you have any questions, please call our office at 781.938.0045 or email admin@schwartzaccountants.com.

LOG IN AND PASSWORD QUESTIONS

Browsers:

Please access the portal using Google Chrome, Microsoft Edge, Mozilla Firefox, or Internet Explorer (v11). **Do not use Safari** (docs will appear blank when you open them in Safari).

How do I log in?

Log in to the portal at: www.netlinksolution.com
Or, you can access the link through our website at: www.schwartzaccountants.com

What is my login?

Your login is the primary email address we have on file for you.

I forgot or want to change my password.

1. Click the "Forgot password?" text on the log in page.
2. When prompted, please enter your login and email (they are the same = your email address)
3. You will be sent a temporary password in an email. The email comes from "support@netlinksolution.com". *Check your spam folder if you don't see it in your Inbox!*
4. Login using the temporary password. *You must type in the password (not cut/paste).*
5. You will be prompted on the Welcome screen to immediately create a New Password and to Confirm/retype it. It will tell you when you are successful *(Passwords must be at least 7 characters and have one letter and one number).*
6. Login using your login/email and the new password you just created.

I want to change my login email or the email that gets notifications that you've uploaded to my portal.

Please contact our office at 781.938.0045. We will ask you a few questions to verify your identity and will make the change to your email/login.

---

*Be careful accessing the portal **through your workplace computer or using a workplace email** as your login. Some companies' firewalls block access to the portal. Also, they may send email notifications or password reset emails to your "spam" folder.*

OVER PLEASE >>>

DOCUMENTS AND ORGANIZER QUESTIONS

How do I send documents to you?

After logging in to your portal, click on "File Exchange" on the left-hand side of the screen under the section "Documents"

In the center panel of the screen, click on the folder named "Documents to Schwartz & Schwartz"

Use the ⬆ Upload button in the toolbar

A pop up box will open for you to "Add Files" from your computer and then select "Start upload"

How do I use my tax organizer?

Your organizer is both interactive AND printable as a PDF. It is completely up to you if you'd like to work on a printed copy or an interactive, web-based version.

How do I use the Interactive version (type my info into the tax organizer online)?

After entering the Tax Organizer section on your Home Screen, you will see a panel of selections (forms) that you can enter data on, such as "income" or "schedule C". If you are a returning client, these sections will include pertinent information from your last year's return.

You can enter your info, save, and log out of the portal as often as you like. When you have completed your data entry, hit "Send to Preparer" and we will receive a digital copy of your organizer with any entries you've made.

> **Please note that you can only hit "Send to your Preparer" once.*
>
> **Please remember to hit "Send to Preparer" at least 24-hours prior to your office appointment or at least 1-week prior to your telephone appointment to ensure we receive your organizer in advance of your meeting.*

Can I attach documents to the Organizer before I hit "Send to Preparer"?

You may also attach supporting documents prior to sending the organizer to us by using the "Upload Tax Documents" link on the Tax Organizer panel of your home screen. You can also upload documents using the File Exchange feature mentioned above.

How do I print my organizer? I want to check what I've typed or I prefer to handwrite my info.

After entering the Tax Organizer section on your Home Screen, click on the "Print PDF" button in the toolbar. The organizer will include any data entry you made online while working in the web-based organizer.

---

*Make sure you **have Adobe Reader version 7.0 or higher installed** on your computer in order to view PDF documents. You can download and install the latest version of Adobe Reader at http://get.adobe.com/reader. Please make sure to **restart** your computer after installation so the software takes effect.*