

# NetClient Portal.

The smart, secure way to access your information.

Taking care of your accounting and financial needs should not take over your life. We have a way that will make it faster and easier for you to get the service and information you need 24/7 - securely and conveniently.

Need a copy of your financials or tax return? Our client web portal provides you with immediate access to your information through the "Document Presentation" feature.

You can also retrieve and send documents and QuickBooks (including QuickBooks files) to the firm via your portal through the "File Exchange" feature.



## FILE EXCHANGE (TRANSMIT FILES TO US):

- Go to [www.dh-cpa.com](http://www.dh-cpa.com).
- Click "Client Login" at top of right-hand screen.
- Enter your login (case and space sensitive) and password information.
- **NOTE: New clients will receive an email with instructions that include login and password information.**
- Click "Log In". NOTE: Passwords will need to reset every 90 days. If you forgot your password simply click the gray wording "Forgot Password?" and follow prompts to reset.
- Home Page: On left side of screen click "File Exchange" to transmit files; Click on your folder name; Click "Upload" icon; in next window click "+Add files" at bottom of screen and browse to your saved files that need to be sent; Click "Open" and when the files appear in the upload window click "Start Upload".
- File name will appear in the window once it has transmitted properly. NOTE: If you need to terminate the transmission, click the red minus button and it will stop.
- To log out click on your folder name in the gray banner and click "Logout". Davis & Hodgdon will receive an email notification that you posted a file to the portal.

## DOCUMENT PRESENTATION (VIEW DOCUMENTS THAT WE HAVE POSTED):

Follow instructions above to log in to the portal.

- Once in your portal, click the folder with your name and/or company name.
- Next page will display all of your documents, clearly labeled, that we have posted to your portal.
- To view documents simply click on the folder you need to access (Tax Return for example).
- Click the year you need to view. PDF files of your documents will be displayed. Click to view. From there, you can also "Print", "Save", or "Email" your documents.

**FORGOT YOUR PASSWORD?** simply click the gray wording "Forgot Password?" and follow prompts to reset.