

# NetClient Portal

**The smart, secure way to send and 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.*

## PORTAL REGISTRATION

*Please call our office to set up your portal if you don't already have one. You will then receive a separate email from NetClient asking you to register for the portal by creating a login and password. Once you've created this, use these instructions to log in.*

## INSTRUCTIONS TO LOGIN:

- 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: Passwords will request a reset every 90 days.
- Click "Log In".

*Please note that you will see a pop-up to set up Multi-Factor Authentication on your account. This is another level of security that is required, however please know that it will require that you have access to your cell phone every time you log into your NetClient portal.*

## FILE EXCHANGE (Transmit Files to Us):

*Once you have logged into your portal:*

- Home Page: On left side of screen click "File Exchange" to transmit files; Click on your folder name in the middle of your screen; 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. Davis & Hodgdon will receive an email notification that you posted a file to the portal. 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".

## DOCUMENT PRESENTATION (View Documents That We Have Posted):

*Follow instructions above to log in to the portal.*

- Once in your portal, click the folder on the left screen 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.
- You can "Print", "Save", or "Email" your documents directly from your portal.*

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