



KMETZ • ELWELL • GRAHAM & ASSOCIATES, PLLC

Certified Public Accountants

File Exchange/Portal

Client Instructions

Portal Registration

Your first time logging into the Portal will be from the registration email link to create your username and password. If you cannot locate this email (from no-reply@thomsonreuters.com) check your spam folder. If you still cannot find it, please give us a call at 772-231-6902 for this or any other technical difficulties. Please note, if you choose the Multi-Factor Authentication, you will need to update this if you obtain a new phone or if you forgot your password. Please call us with authentication trouble so we can issue you a temporary code.

Logging into the Portal

Go to our website, www.kegacpa.com and click Client Log in (on the top of our website's home page.)

You can also click the Resources tab from the home page and this will direct you to our Client Center where, in addition to logging in, you can find helpful tutorials on using the Portal for Client Organizer, Reviewing your 1040 or Using the File Exchange.

Uploading documents

Once you have created your Log-in ID & password, you will be able to securely upload documents to us. You can upload files of up to 2 gigabytes (GB.) It is recommended that these files are uploaded directly from your computer, network or mobile device.

1. Once you have logged in, find the NetClient CS tab of the navigation pane and click the **File Exchange** link. (If you don't see this link, you don't have access to the File Exchange. Please call our office to correct this.)
2. In the File Exchange screen, click the folder to which you will upload the file. You may need to navigate through subfolders if you have multiple clients or entities being accessed in your Portal.
3. Click the Upload Icon,
4. Do one of the following:
 - a. Click the Add files button and navigate to the files you want to upload, select them and click the Open button. After you add all of the files that you want to upload, click the Start upload button.

- b. If your internet browser supports HTML 5, the words “Drag files here” appear in the upload section. You can upload files by opening Windows Explorer, navigating to the files you want to upload, selecting the files and dragging the files to the file list. After you add all of the files that you want to upload, click the Start upload button.
- c. If the files you need to upload are in Dropbox, click Choose from Dropbox at the bottom of the upload dialog, navigate to and select the files you want to upload and click the Choose button.

*Note: To select files that are listed consecutively, click the first file, press and hold the SHIFT key and then click the last file. To select multiple files that are **not** listed consecutively, click a file and then press and hold down the CTRL key while you click additional files.*

Viewing documents in the Portal

1. From the NetClient CS navigation pane, under File Exchange, find and click the folder for which you want to view documents,
2. Find the corresponding folder for the type of document, (Tax Returns, Correspondence, Monthly Accounting,) and the appropriate year end.