

Creating Portal Account (New User)

Once our team has created you as a user in our client portal you will receive a registration email. Follow the below steps for setting up your account.



Alert! For this to work you will need to ensure that the email address given to create your account is not already registered as a Thomson Reuters account.

1

Check the email that the portal was created under for a registration email. The email will come from *Thomson Reuters*.

2

Click "Register".

Register your NetClient CS account



Anderson, Adkins & Company, CPAs, PC <no-reply@thomsonreuters.com>
To: Test

☺ Reply Reply All Forward

Mon 7/8/20

Dear Test User,

Welcome to NetClient CS. Please [Register](#) your account.

After you register your account, you can log in from the NetClient CS [Login](#) page.

Thank you for using NetClient CS.

Anderson, Adkins & Company, CPAs, PC
604 Ponder Place Dr
Evans, GA, 30809

This electronic mail message contains confidential and legally privileged information intended only for the recipient. If the reader of this message is not the intended recipient, the reader is hereby notified that any dissemination, distribution, copying or other use of this message is strictly prohibited.

3

You will be redirected to the Thomson Reuters website to 'Create an account'. Most of the information will be prefilled for you.



Create an account

Access your products with a single Thomson Reuters account.

Already have an account? [Sign in](#)

All fields are required.

First name

Last name

4

Create a password for your portal account. You will need to enter this twice to confirm the password.

Last name

Email

New password

Your new password must contain:

At least 8 characters in length

At least 3 of the following:

An uppercase letter (A-Z)

A lowercase letter (a-z)

A number (0-9)

A special character (@#, etc.)

Confirm new password

5 Choose your preferred language and agree to the terms of use. Click "Continue".

✔ A special character (@#!, etc.)

Confirm new password

Preferred language

→

→ I agree to the [terms of use](#)

Continue

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6 You will be prompted to verify your email address by entering the code that was sent to the email associated with your account.

Verify your email

We've sent a 5-digit code to your email **test@augustacpas.com**. Verify your email by entering the code below. Once verified your account will be created.

Verify your 5-digit code [Resend code](#)

Code is valid for 2 hours.

Create your account

7

The email to retrieve the code will look like this.

Verify your Thomson Reuters account



Thomson Reuters <access.info@thomsonreuters.com>
To: Test

Reply Reply All Forward

Mon 7/8/202

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



Right-click or tap and hold here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

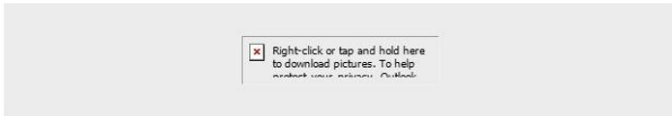
Verify your Thomson Reuters account

Hi Test,

Thanks for signing up for a Thomson Reuters account. Your verification code is listed below. Enter this code on your sign-in page to complete set up.

88199

Thanks,
Thomson Reuters



Right-click or tap and hold here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

8 Enter the 5 -digit code received via email and click "Create your account"

We've sent a 5-digit code to your email **test@augustacpas.com**. Verify your email by entering the code below. Once verified your account will be created.

Verify your 5-digit code [Resend code](#)

Code is valid for 2 hours.

8	8	1	9	9
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Create your account

9 You will be redirected to the login box. You will need to enter your email address (if not already prefilled) and the password you created in step 4 and Click "Sign in".

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Sign in to NetStaff CS or
NetClient CS

test@augustacpas.com [Edit](#)

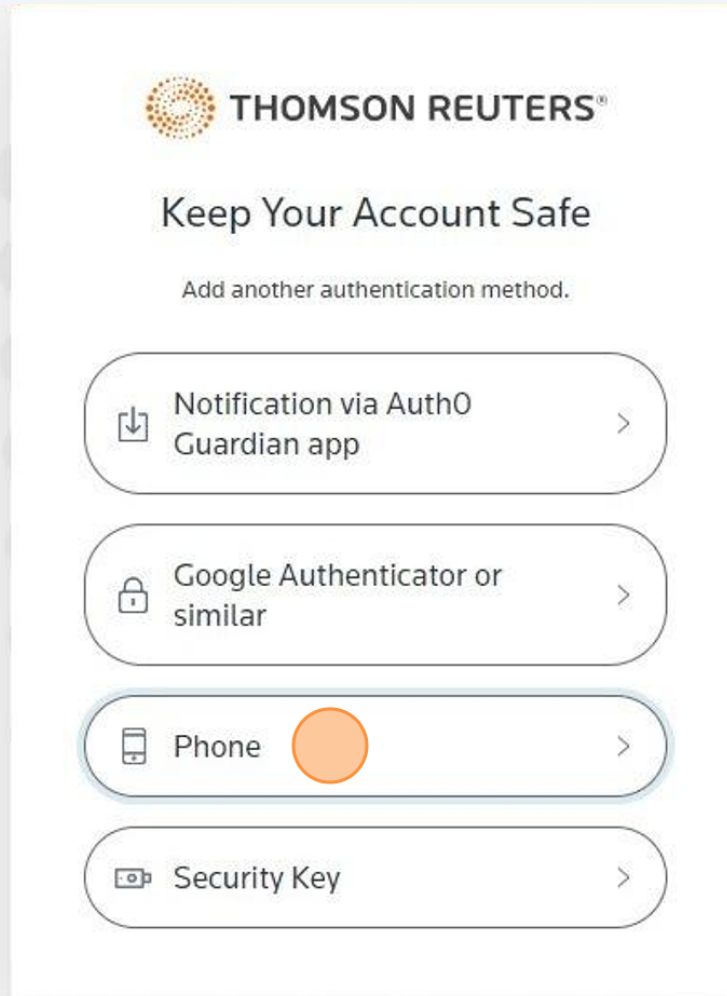
Password*
..... [👁](#)

[Reset your password](#)

Sign in

10

You will be redirected to set up a multifactor authentication method (MFA). Choose which method you prefer.




Tip! We suggest you use "phone" as your MFA method- this will send a code to your phone (via text or call- whichever you prefer) each time you log in to your account.



Alert! For the purpose of this demonstration, we have selected "phone" as the MFA method.


11

You will need to enter your preferred phone number and method of receiving the code. Click "Continue".

 **THOMSON REUTERS®**

Secure Your Account

Enter your country code and phone number to which we can send a 6-digit code:



Enter your phone number

How do you want to receive the code?

[Try another method](#)

- 12 Enter the six-digit code that you received via text or call and Click "Continue".

verify your identity

We've sent a text message to:

+1 [masked] [Edit](#)

Enter the 6-digit code*
253751

[Continue](#)

Didn't receive a code? [Resend](#) or [get a call](#)

[Try another method](#)

- 13 You will need to indicate that you have safely recorded the recovery code and Click "Continue".

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Almost There!

Copy this recovery code and keep it somewhere safe.
You'll need it if you ever need to log in without your device.

NKGVTJQ2K76YQ93MET7L6FZ

[Copy code](#)

I have safely recorded this code

[Continue](#)



Tip! You can generate a new recovery code through your MFA settings once logged into your portal account.



Alert! This code is used as a recovery code if you do not have access to the MFA method that you set up. Keep this code somewhere that is accessible.

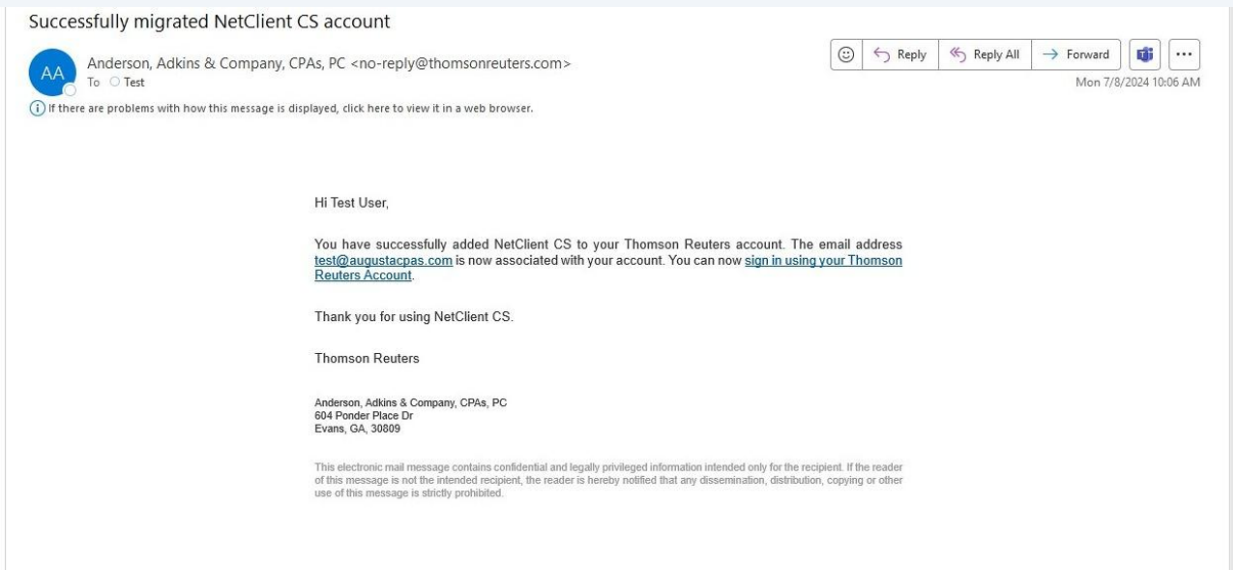
14 You now have access to your client portal.

The screenshot shows the NetClient CS client portal interface. The top navigation bar includes 'Home', 'Messages', and a user profile for 'Test User'. The left sidebar shows 'Documents' and 'ClientFlow'. The main content area displays a table with the following data:

Client Name	Client Number
CLIENT FOLDER EXAMPLE 1	TEST
CLIENT FOLDER EXAMPLE 2	TEST2

15

You will receive an email from *Thomson Reuters* stating that your account has been successfully created- no further action is required.



Tip! View the "Navigating your Client Portal" instructions to learn how to use your portal.