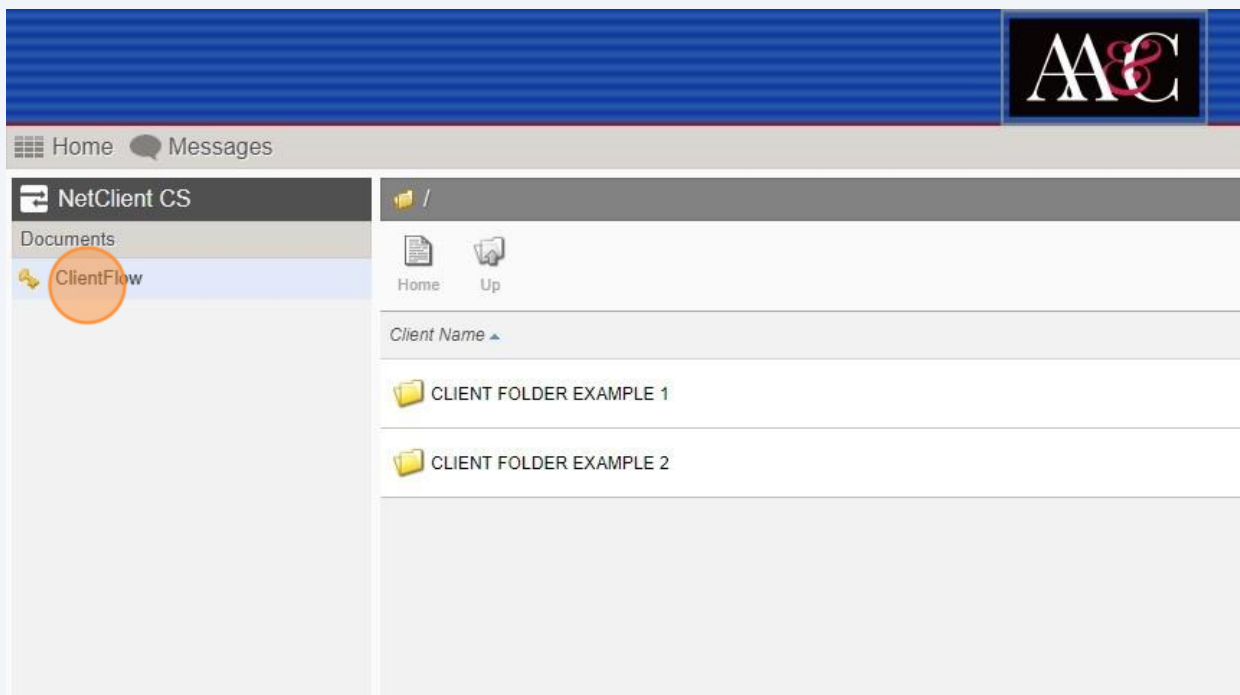



Navigating your Client Portal.

1 Login to your portal account via our website.

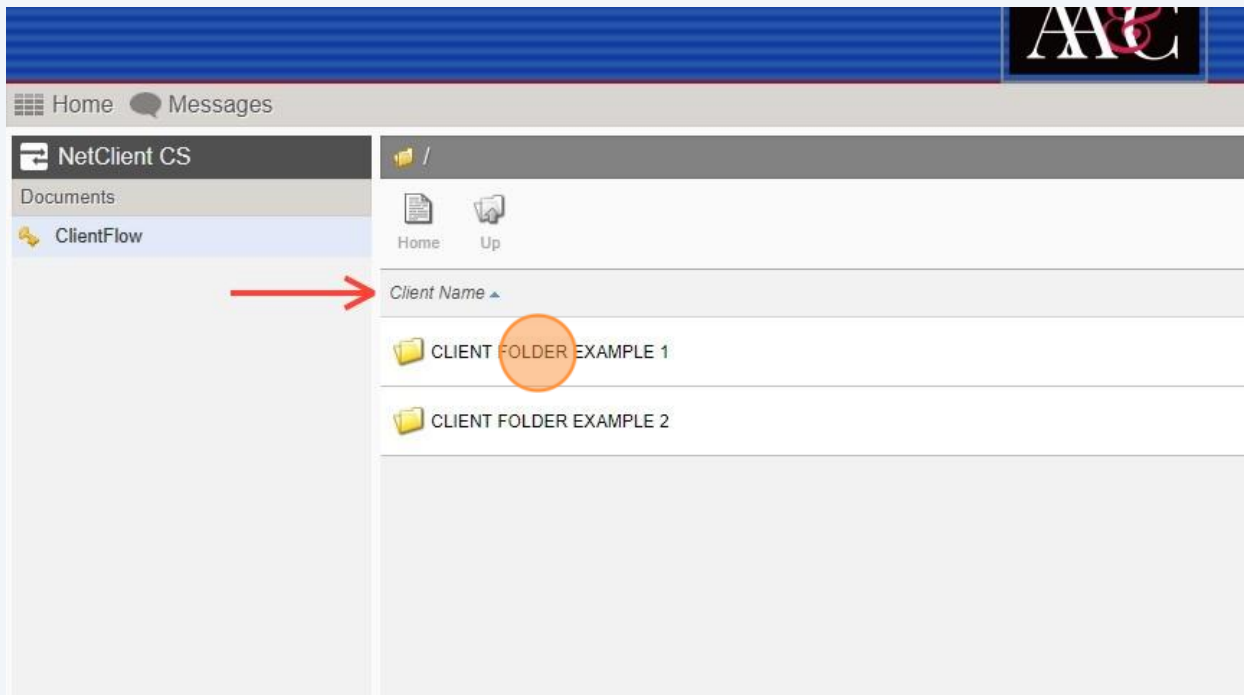
 Tip! Visit our login instructions if you need assistance.


2 Clicking "ClientFlow" will show you a list of all folders you have access to.



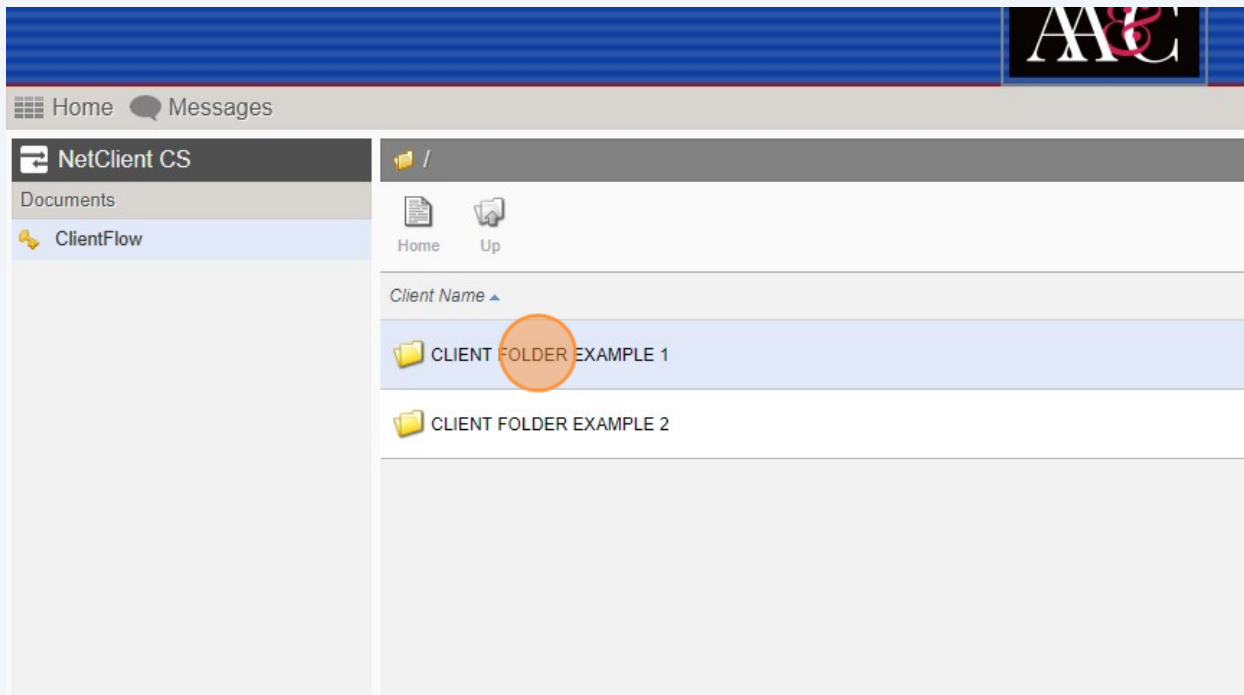
 Tip! If you need access to an additional folder, such as a business, that is not shown, please contact our office.

3 Under "Client Name" you will see each folder you have access to.

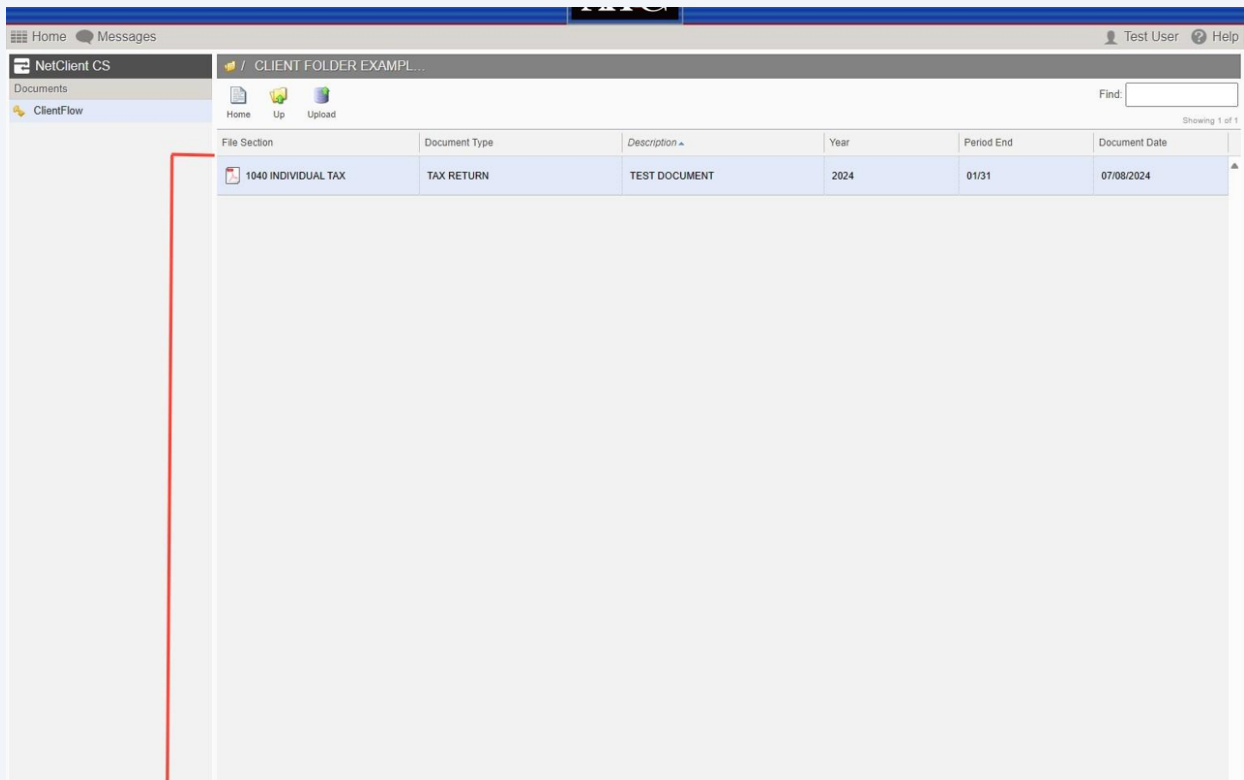


 Tip! You can sort these folders by clicking "Client Name".

4 Click the folder you are wanting to view documents in.



5 You are now viewing all documents inside of the folder clicked in Step 4.





Tip! If you click on a document inside of the folder selected in Step 4 you can view, print, or save that document.



Alert! Documents that are published to you or that you have uploaded will be listed here. Unfortunately, subfolders are not created separating these documents. If you cannot find a document you are searching for, please contact our office for additional help.

6

Since subfolders are not created for the documents listed: To separate information for quicker access, you can click any of the headers to sort the information.

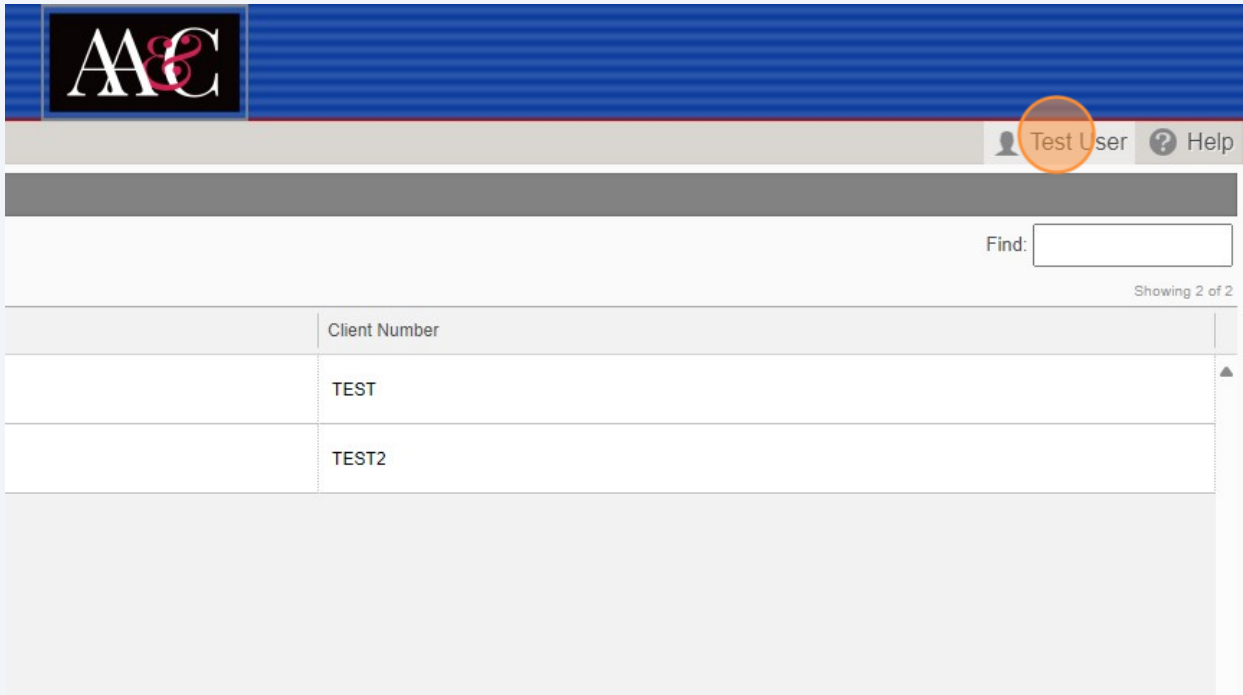
File Section	Document Type	Description	Year	Period End	Document Date
1040 INDIVIDUAL TAX	TAX RETURN	TEST DOCUMENT	2024	01/31	07/08/2024



Tip! We have found the most effective way to sort the information is by "Document Date". This is the date that the document was published to your portal.

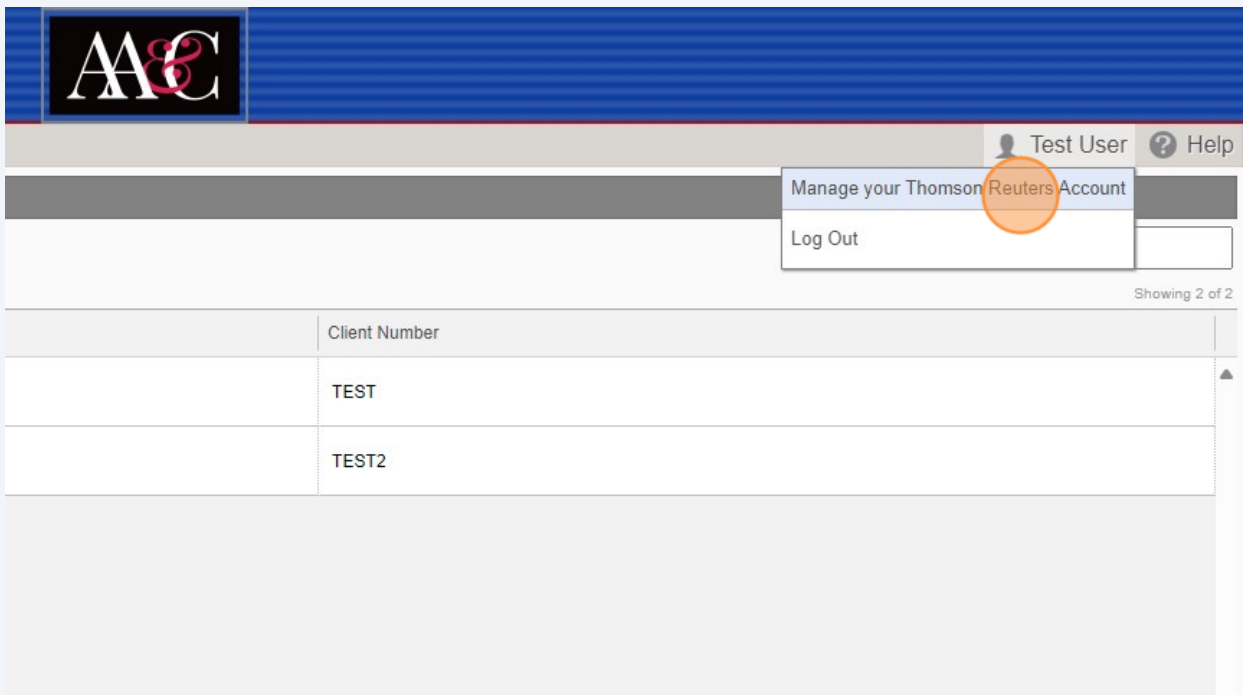
7

At the home screen, you will see in the top right-hand corner your first and last name indicating that you are logged into your portal account.



8

Click "Test User", you will see a drop down, Click "Manage your Thomson Reuters Account".



9

This is where you will find all of the option for updating and/or changing your account.

The screenshot shows the 'Manage account' interface. At the top left is a user profile icon. The main heading is 'Manage account' with a 'Sign out' button in the top right. There are two main sections: 'Profile details' and 'Security details'.
The 'Profile details' section includes:

- Name: Test User
- Preferred language: English (US)
- An 'Edit profile' link with a red arrow pointing to it.

The 'Security details' section includes:

- Email: test@augustacpas.com with a 'Change email' link and a red arrow pointing to it.
- Password: [masked] with a 'Change password' link and a red arrow pointing to it.
- Two-factor authentication: Enabled (indicated by a green 'Enabled' badge).
- A 'Manage verification' button with a red arrow pointing to it.

10

By Clicking, "Change Email" (refer to step 9) you will see the following drop-down option. Enter the new email address you would like to use and Click, "Save".

This screenshot shows the 'Change Email' form within the 'Manage account' interface. The 'Profile details' section remains visible on the left. The 'Security details' section is now expanded to show the email change process:

- 'Current Email' is test@augustacpas.com.
- A note states 'All fields are required.'
- 'New email' and 'Retype new email' are input fields, both with red arrows pointing to them.
- There are 'Save' and 'Cancel' buttons.
- Below the buttons, there is a 'Password' field with a 'Change password' link.
- The 'Two-factor authentication' section is still visible at the bottom, showing it is 'Enabled' and has a 'Manage verification' button.



Tip! You may be required to authenticate that email address.

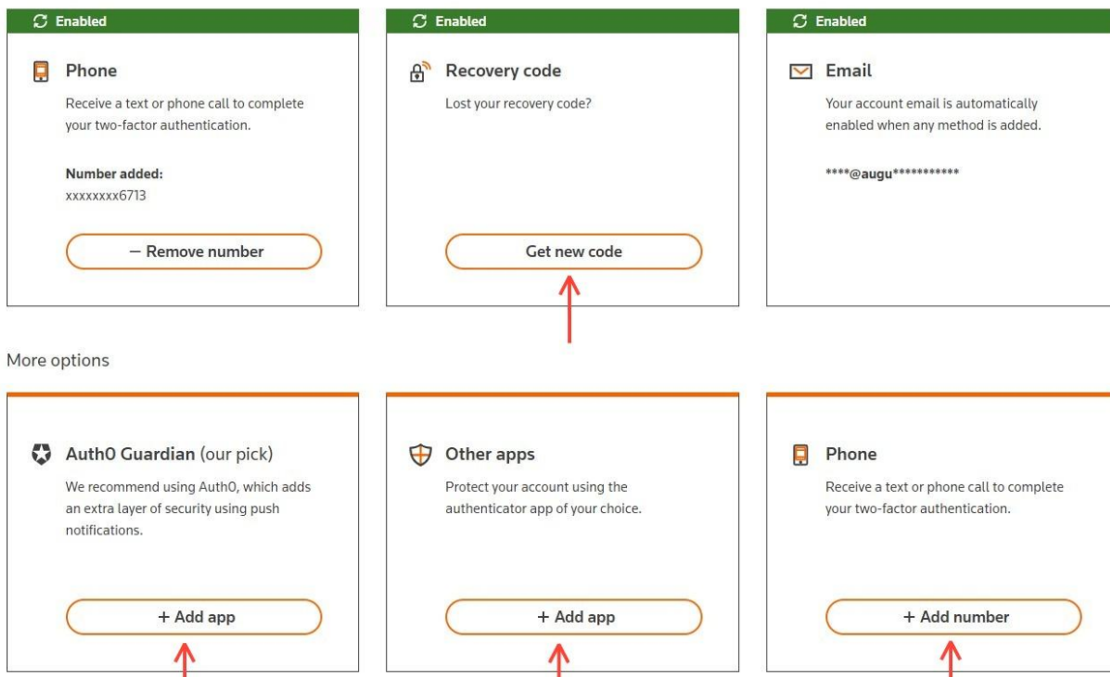
11

By Clicking, "Change Password" (refer to step 9) you will see the following drop-down option. Enter the new password you would like to use and Click, "Change password".

The screenshot displays the 'Manage account' interface. On the left, the 'Profile details' section shows the user's name as 'Test User' and preferred language as 'English (US)'. On the right, the 'Security details' section is active, showing the email 'test@augustacpas.com'. Below the email, there are instructions for a 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.)'. There are two input fields: 'New password' and 'Confirm new password', both with red arrows pointing to them. Below these fields are 'Change password' and 'Cancel' buttons. At the bottom, there is a 'Two-factor authentication' section which is currently 'Enabled' and a 'Manage verification' link.

12

By Clicking, "Manage Verification" (refer to step 9) you will be redirected to this screen. These are the MFA options that you have available to set up.



Tip! You can set up multiple phones for verification purposes.



Tip! If you lost the recovery code you were prompted to copy when you created and/or updated your account you can generate a new one here.

- 13 Click "Back to account" to return to the Manage Account box.

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[← Back to account](#)

Manage two-factor authentication

About two-factor authentication

Two-factor authentication adds an extra layer of security to your account. Once set up, you'll sign in to your account using a combination of a password and a second factor, such as a text message or a security key, that is available. Learn more about [two-factor authentication](#).

Manage methods

- 14 Click "Edit profile"

Manage account

Profile details

[Edit profile](#)

Name
test User

Preferred language
English (US)

Security details

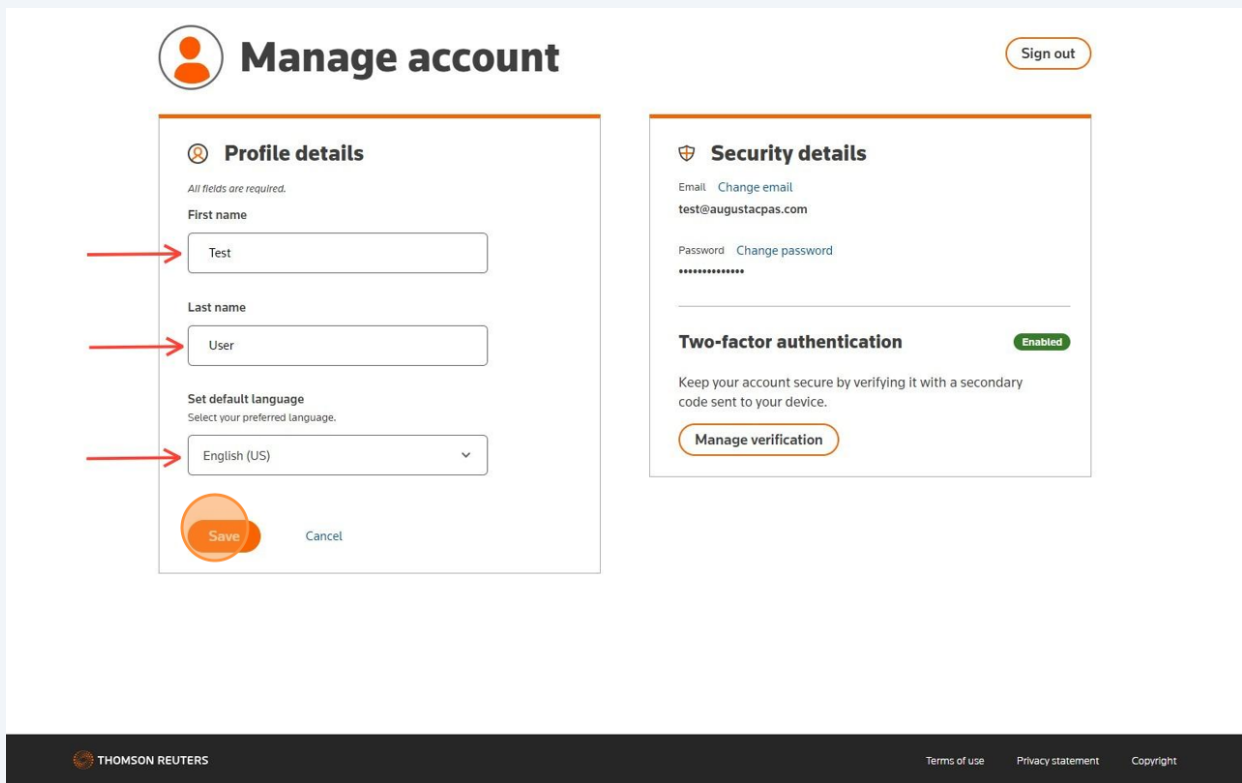
Email [Change email](#)
test@augustacpas.com

Password [Change password](#)
.....

Two-factor authentication

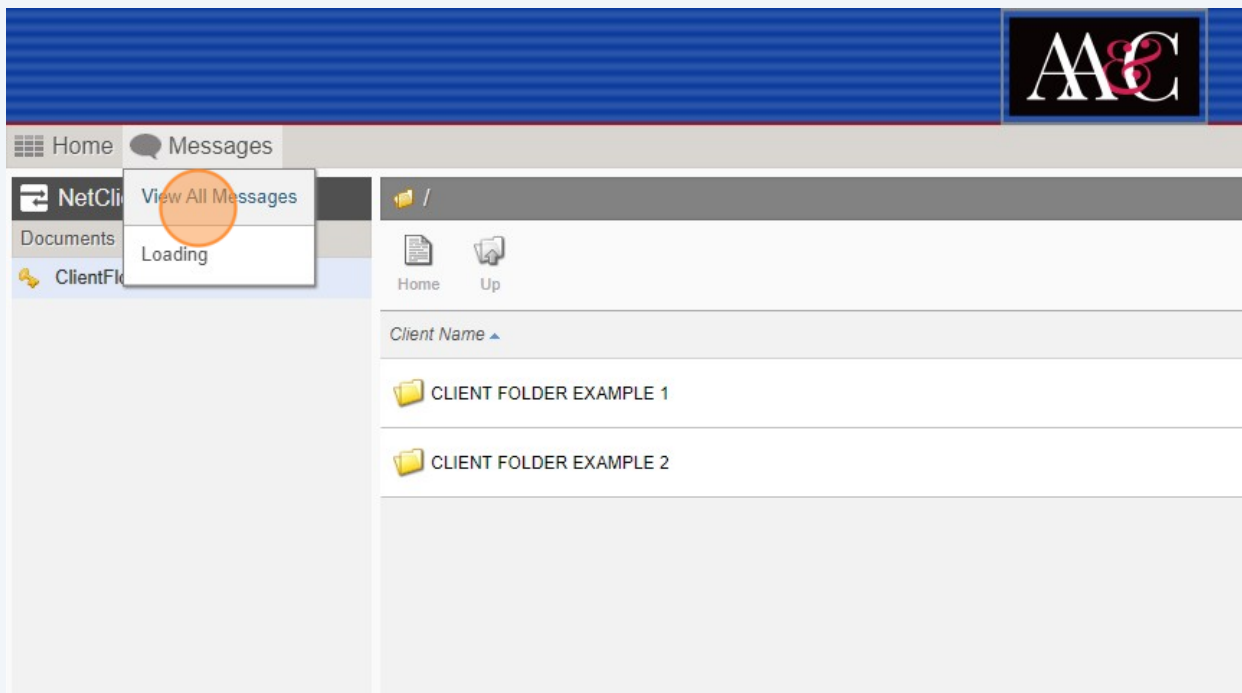
15

Here you can update your first and/or last name, as well as your language preference. If you make any changes in the profile details box, be sure to Click "Save".



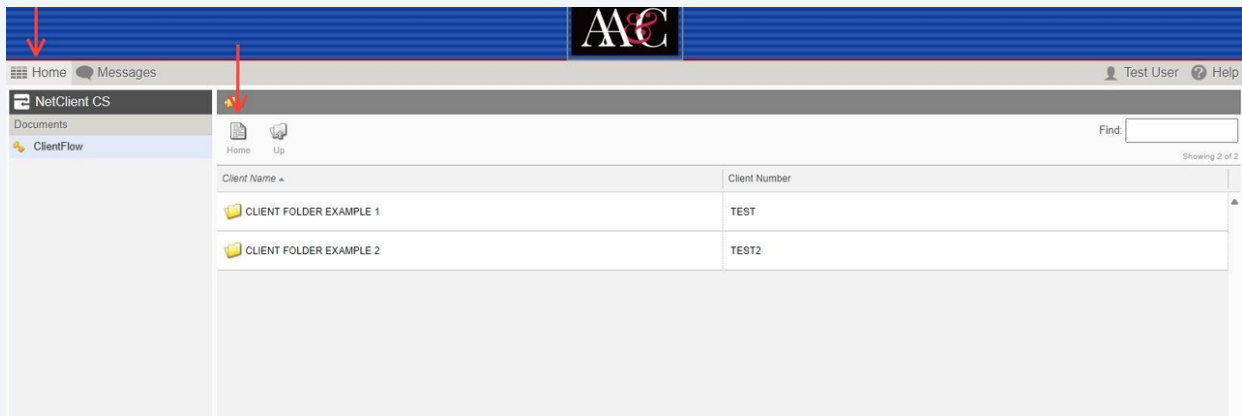
16

Clicking "Messages" will give you a drop-down and allow you to view all messages. If any changes occur to your account details, you will be notified here.



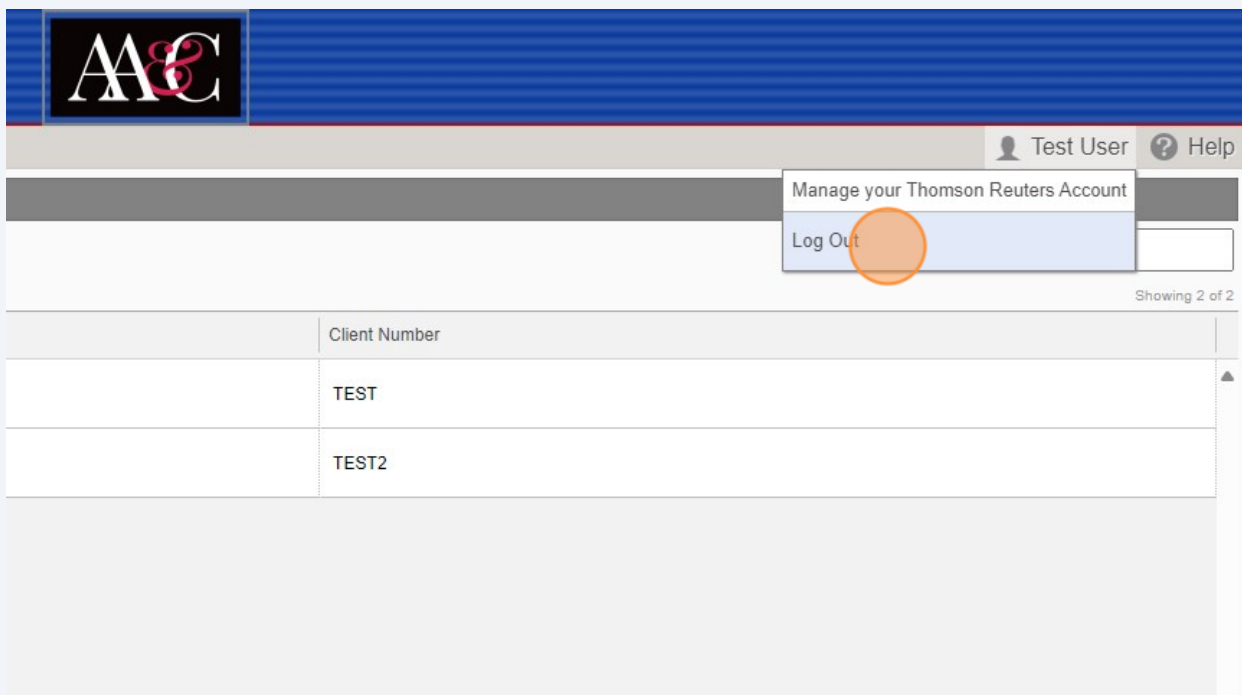
17

You can click either home button and you will be directed to the main screen (what you are seeing in the picture)



18

To log out of your account, Click your name, and "Log Out".



Tip! Never stay logged into your portal account, especially if you are using a public device or internet connection.



Tip! Important, Confidential information is shared using this portal account- Keep it as secure as possible!