

Upgrade NetStaff CS or NetClient CS login for Portal.



Alert! If you have not logged into your existing account since 11/18/23 these steps pertain to you.



Alert! This is an update that is required by *Thomson Reuter*. You must upgrade your account to view your portal. This only affects those that have an existing portal account, and have not logged in since 11/18/23.

1

Navigate to <https://www.augustacpas.com/>

2

On our website choose the following: Client Portal>Login Now (Enter).

- 3 Click "Upgrade my NetStaff CS or NetClient CS Login".



Our most important assets are you.


Sign in with Thomson Reuters Account

OR

Don't have a Thomson Reuters Account, or need to upgrade another set of credentials

Upgrade my NetStaff CS or NetClient CS login

[Account upgrade help](#) 

[View system status](#) 

4

Enter your username and password credentials that were setup/used the last time you accessed your portal account.

ANDERSON, ADKINS
& COMPANY
CERTIFIED PUBLIC ACCOUNTANTS
Relationships Are Our Assets.

Our most important assets are you.

NetStaff CS or NetClient CS login

→

Password

→

[Forgot password?](#)

[Upgrade my NetStaff CS or NetClient CS login](#)

[Account upgrade help](#)

[View system status](#)



Alert! The NetStaff CS or NetClient CS Login will not be your email - unless you set up your login to be your email.



Tip! If your account has not already been upgraded, we do have the ability to share with you what your current username is and update your password for you. Please give our office a call if this is needed. We will not share login information via email for security purposes.

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Once you have entered your username and password, Click "Upgrade my NetStaff CS or NetClient CS Login".

Enter your **NetStaff CS** or **NetClient CS** credentials to upgrade to a new login. [Watch how](#)

NetStaff CS or NetClient CS login

Username

Password

[Forgot password?](#)

Upgrade my NetStaff CS or NetClient CS login

OR

Already upgraded?

[Sign in with Thomson Reuters Account](#)

[Account upgrade help](#)

[View system status](#)

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You will need to enter the email address you would like your account to be associated with. This needs to be an email you have access to as a verification code will be sent to that email before the upgrade is complete. Once you have entered the email, Click "Continue".

The screenshot shows a web form titled "Upgrade to a new login". The text reads: "We've upgraded our digital platform. To access your account, create a new login using an email address." Below this is the instruction "Enter the email you'd like to use as your new login:" followed by a text input field. A blue button labeled "Continue" is positioned below the input field. Underneath the button is the text "Why do I have to do this?" with an information icon (i) in a square. At the bottom, there is a link "Account upgrade help" with an external link icon.



Tip! This email can be the email that you already have associated with your account or a different one.



Tip! This email will become your new "username" for logging in once the upgrade has been complete.

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You will be required to enter a new password for your account, choose your preferred language, and accept the terms of use. Once this is done, Click "Continue".

The screenshot shows a form for account upgrade with the following sections:

- New password:** A text input field with a masked password (*****). A small eye icon is on the right.
- Your new password must contain:**
 - At least 8 characters in length (checked)
 - At least 3 of the following:
 - An uppercase letter (A-Z) (checked)
 - A lowercase letter (a-z) (checked)
 - A number (0-9) (checked)
 - A special character (!"#\$%&'()*+,-./:;<=>?@[\\]^_`{|}~) (checked)
- Confirm new password:** A text input field with a masked password (*****). A small eye icon is on the right.
- Preferred language:** A dropdown menu showing "English (US)".
- I agree to the terms of use:** A checkbox that is checked, followed by a link to "terms of use".
- Continue:** An orange button.

Annotations 'a', 'b', 'c', and 'd' are placed on the form:

- 'a' is next to the password requirements list.
- 'b' is next to the preferred language dropdown.
- 'c' is next to the terms of use checkbox.
- 'd' is next to the Continue button.



Alert! Your email should be prefilled in once you begin this section of the upgrade, however if it is not you will need to enter the same email entered in Step 6.

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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@augustapas.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

9

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.

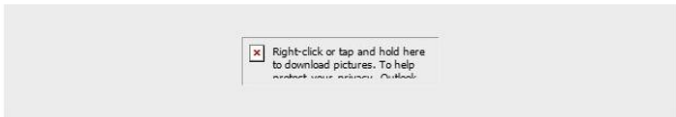
Verify your Thomson Reuters account

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.

10

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

Create your account



Alert! The upgrade is now complete, you will then be redirected to the login screen.

11

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 7 and Click "Sign in".

THOMSON REUTERS®

Sign in to NetStaff CS or
NetClient CS

test@augustacpas.com [Edit](#)

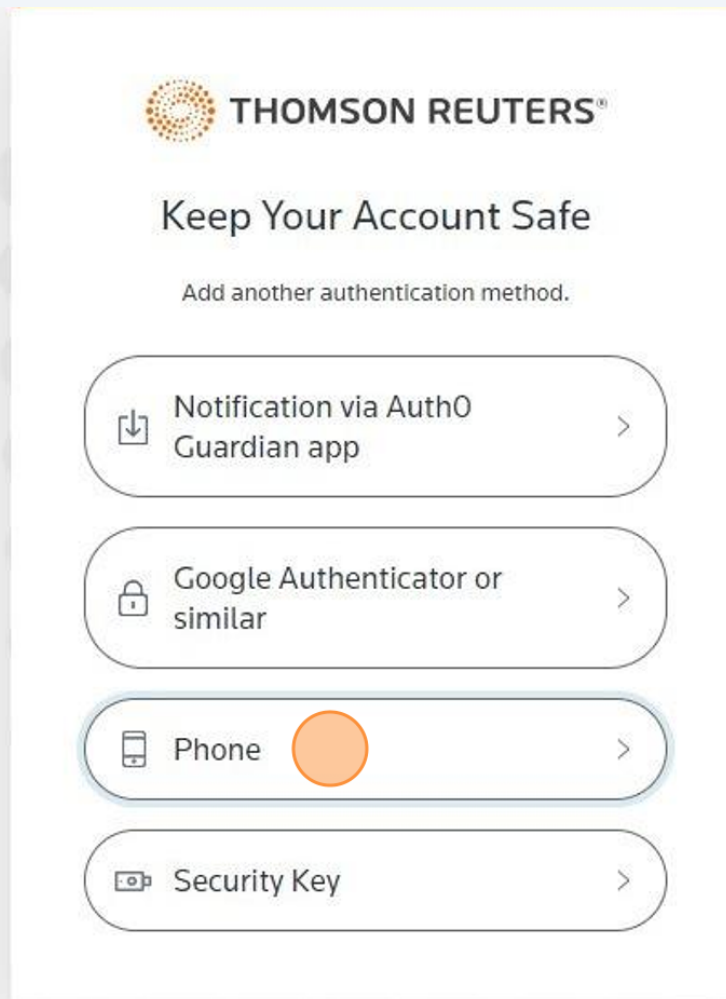
Password*
***** [👁](#)

[Reset your password](#)

[Sign in](#)

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You will be required 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.


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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:

 United States, US, +1 >

Enter your phone number

How do you want to receive the code?

[Try another method](#)

- 14 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 [redacted] [Edit](#)

Enter the 6-digit code*
253751

[Continue](#)

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

[Try another method](#)

- 15 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.

NKGVJTJQ2K76YQ93MET7L6FZ

[Copy code](#)

I have safely recorded this code

[Continue](#)



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



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.

16 You now have access to your client portal.

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



Tip! For information on how to sign in after upgrading your account refer to "Client Portal Sign in (Existing Users)".