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 exisiting 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".

CERTIFIED PUBLIC ACCOUNTANTS
Relationships Are Our Assets.

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.

⚠ 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.

5 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

6   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".

Upgrade to a new login

We've upgraded our digital platform. To access your account, create a new login using an email address.

Enter the email you'd like to use as your new login:

[   ]

[Continue]

Why do I have to do this?   ⓘ

Account upgrade help ⤴

ⓘ   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.

7 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".

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 (!"#$%&'()*+,-./:;<=>?@[\]^_`{|}~)

a

Confirm new password

••••••••

Preferred language

English (US)   ˅

b

☑ I agree to the terms of use ⬈   **c**

Continue   **d**

⚠ 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.

8 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

9 The email to retrieve the code will look like this.

Verify your Thomson Reuters account

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

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.

☺ | ↩ Reply | ↩↩ Reply All | → Forward

☒ 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.

☒ 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.
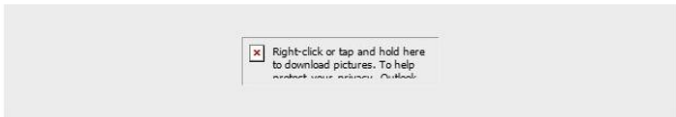
Verify your Thomson Reuters account

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

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".

12 You will be required to set up a multifactor authentication method (MFA). Choose which method you prefer.
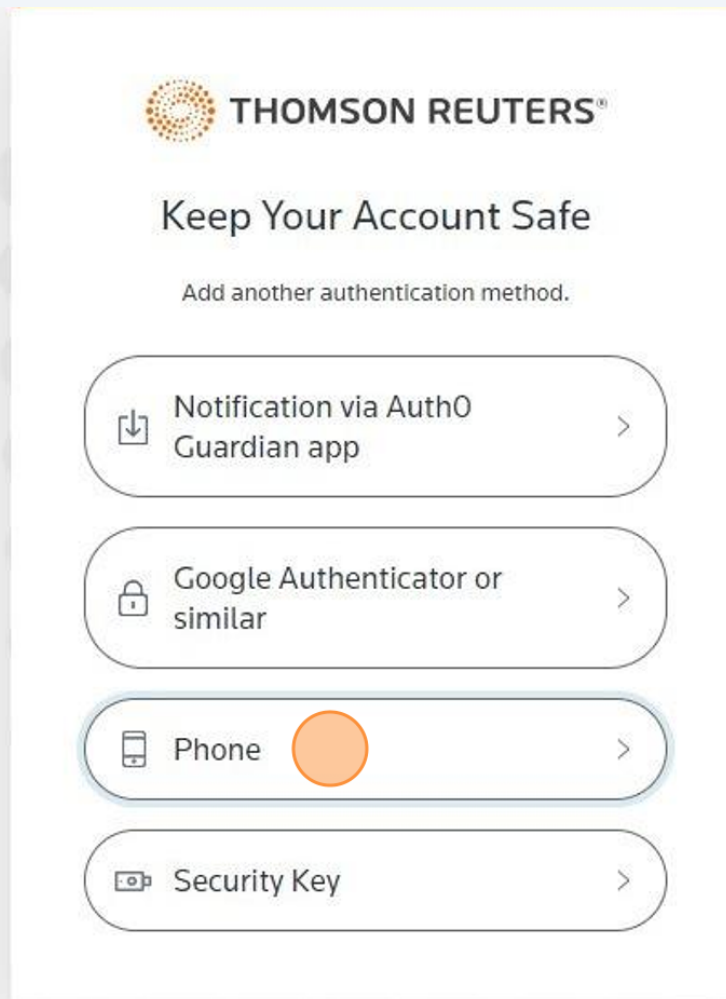
ⓘ Tip! We suggest you use "phone" as your MFA method- this will send a code to your phone (via text or call- whichever you prefer) each time you log in to your account.

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

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

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

15 You will need to indicate that you have safety record the recovery code and Click "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.

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