Login to your portal.

Client Portal

Thank you for your interest in our client portal.

- Too much paper?
- Ready to go paperless or simply start to?

If you answered yes to either of the above questions, you may be ready to lose the clutter when it comes to preparing your tax returns or sharing other sensitive financial information.

Going paperless is easier than you think. Easily access and organize your personal and business information. Lang Allan & Company CPAs PC's online portal allows you to have access to tax returns and other documents online 24/7, 365 days a year.

Our portal is a client specific, secure web space, designed for transmission and retrieval of information.

Simply provide the email address and contact information we should use for correspondence related to your information. Instead of waiting for your tax return and information to come in the mail, you could receive it as soon as it is ready using the online portal. Receiving your tax returns and financial information has never been easier!

Portal login instructions

Login to your portal. Once you are registered for your portal, you have access to your documents whenever you need them.

Your user identification and password were created during the registration process. If you forgot your username you must contact our office for that information to be provided to you. If you forgot your password, try a password you think you may have used before. After a failed attempt, you can select the "forgot password" option, and elect to reset by email or answer a series of security questions to reset the information. When resetting your password, be sure to review the security feature/requirements for the new password. As a reminder, you cannot use a prior password. Note that your email address when the portal was setup is what is used for the email reset feature. If you have changed your email address since your registration, please contact our office to update your information, so that you may reset your password.

Once logged in, you can then change your username, email address and password (see the last screen shot/instruction below).

Whenever you change your username and/or password, an email notification will be sent to your email address registered to the portal to notify you.

Portal usage

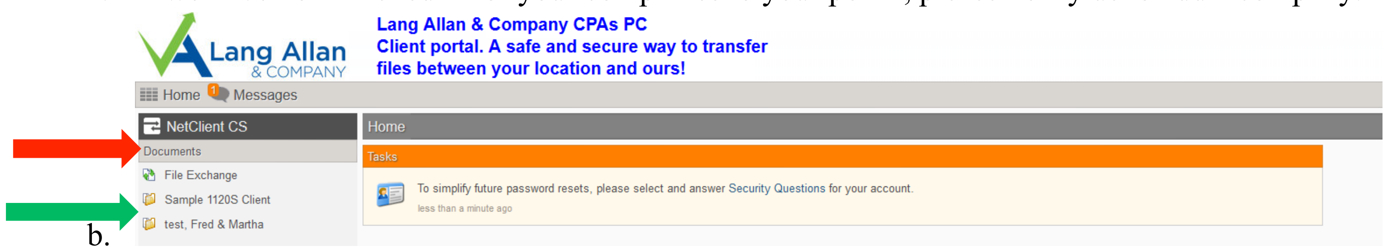
When we upload a document to you, you will receive an email with a direct link to the file. Select the link and it will ask you to login to the portal (see above instructions).

To retrieve documents we have sent to you from the portal:

1- Login to the portal.

2- On the top left of your portal, under “Documents” (red arrow below) will be your name and any other business (green arrow below) we have linked to your portal.

   a. If we have not matched all of your companies to your portal, please notify us to add a company.

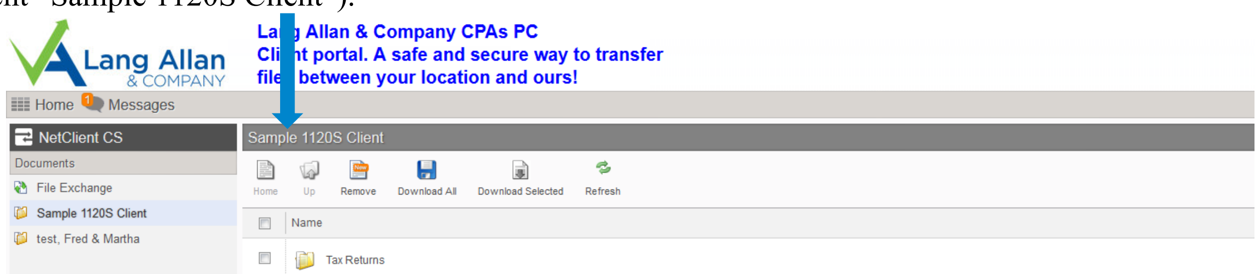


   b.

3- Select the name/company folder you are looking for information.

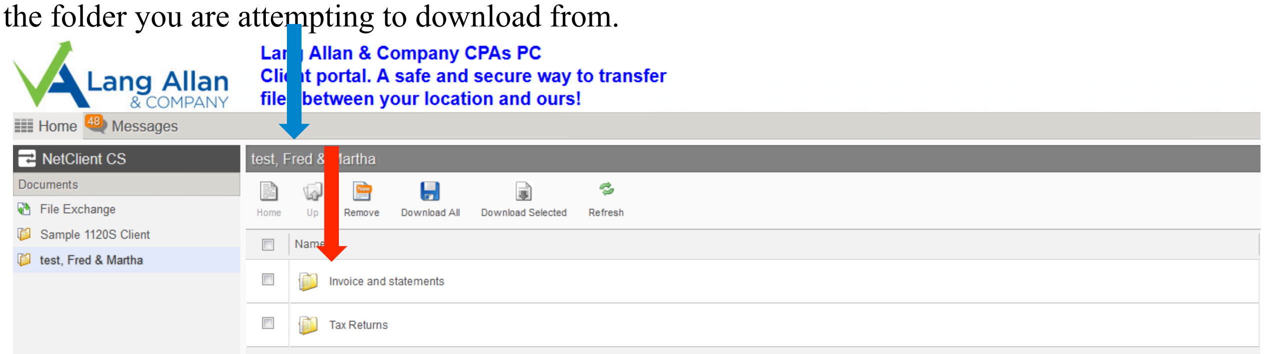
   a. In this example we have linked Fred and Martha Test and Sample 1120s Client to your portal.

4- You will know the client folder you have selected by reviewing the gray bar across the middle of the screen; it will be the client you have selected (see blue arrow below, in this example we have selected the client “Sample 1120S Client”).



   a.

5- Select the folder you are attempting to download from.



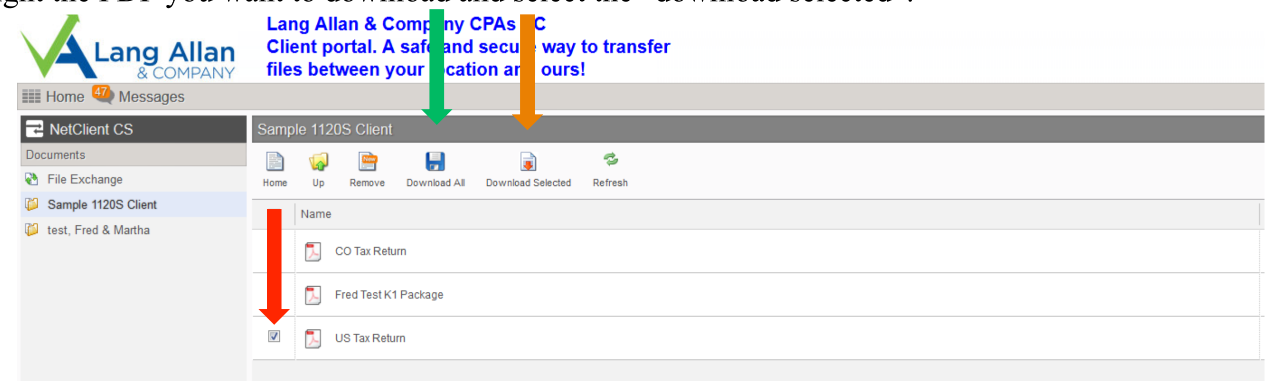
   a.

   b. In this example we have selected Sample 1120S Client (blue arrow) and then the Tax return folder (red arrow).

c. Note your portal may have move folders to select through and may include an invoice and statements folder; if we have set you up to receive statements and invoices, they will also be uploaded to your portal via this folder.

6- Select the year you are attempting to download from (not shown for example).

7- Highlight the PDF you want to download and select the "download selected".

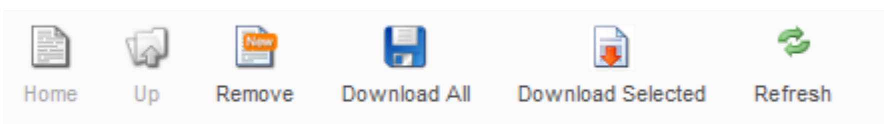
a. 

b. Select the files you want to download, by checking the box next to the file (red arrow).

c. Download all (blue button if more than one selected) or download selected (orange button for one at a time).

8- Your document will download to your computer's "download" folder.

a. For items 5 – 8, you may select the entire folder to download rather than a particular item. Simply select the folder and then select "download all". Your files will be downloaded then all at once.

b. 

c. You may also remove files, select several items and download selected, download all, and/or refresh your screen by selecting the icon shown above, which will be listed below your name/business portal you are logged into.

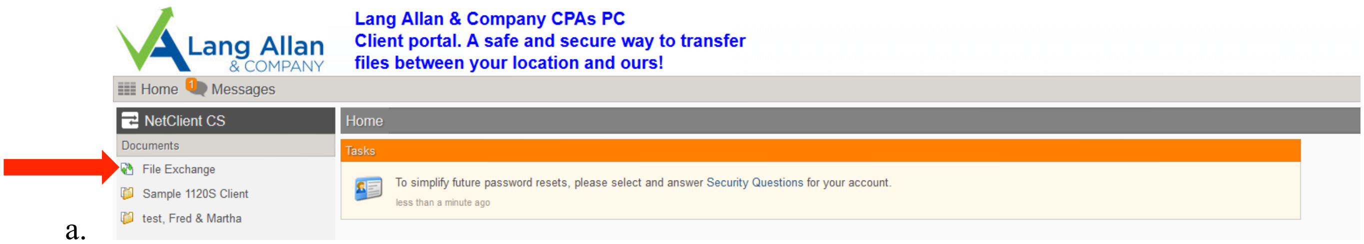
9- If you wanted to repeat the process of the other clients linked to your portal, select the other client name (step two above) and start the process over.

10- Each client is linked to an email account. If you have multiple businesses, your personal and each business should be listed separately.

To share documents with us via the portal.

1- You must have the file on your computer or a portable drive connected to your computer.

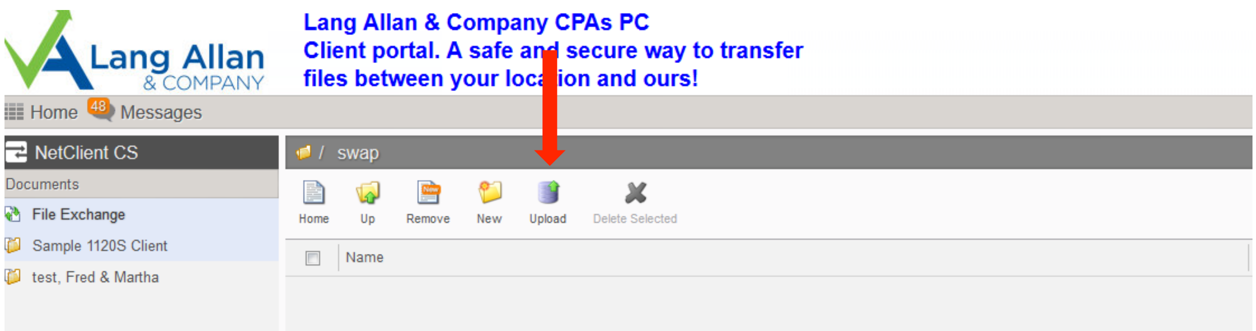
a.



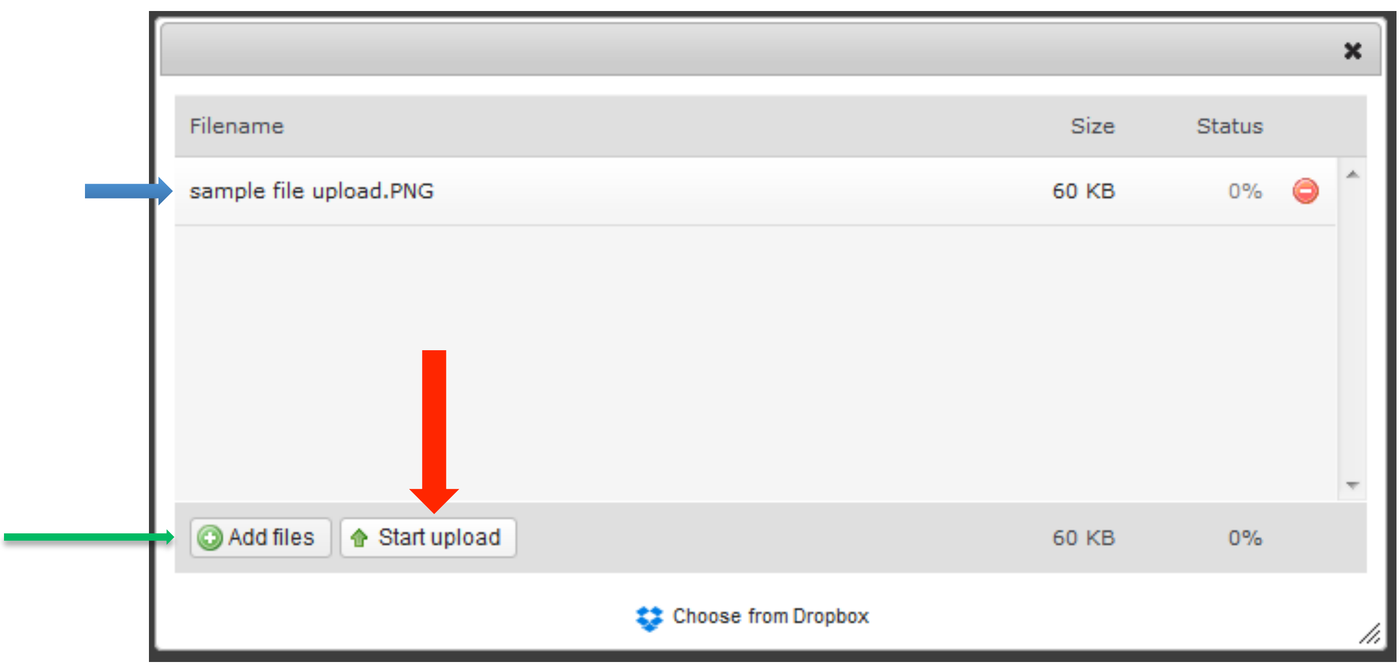
2- On the top left corner of your portal, select the Documents/File Exchange icon (red arrow).
   a. Note that you simply share files back to us in total, not per client.

3- Select the folder to upload documents to. Most often this will be defaulted to "source documents" or "swap" folder.

a.



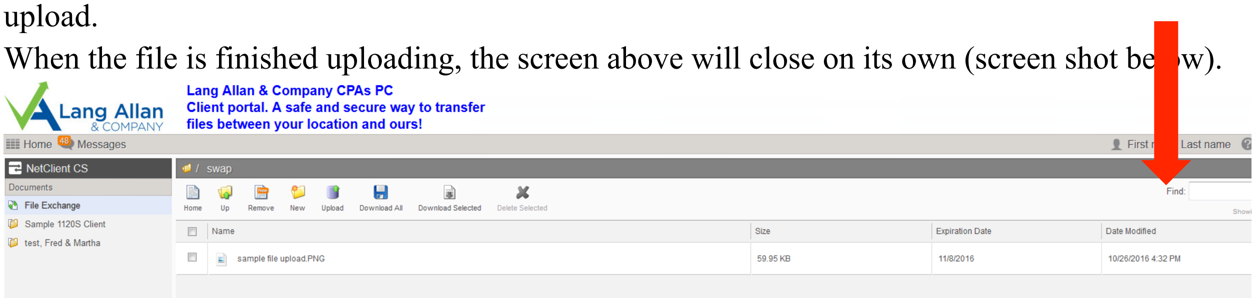
4- Select the Upload icon (red arrow).
5- Simply drag the file from your computer into this window that opens:
   a.



b. In the above example, I dragged the file “sample file upload.png”. To add more files to upload, either select multiple files and drag at once or select the “add files” bottom right corner (green arrow).

c. When finished be sure to START UPLOAD (red arrow) and wait for the upload to finish. Depending on your internet speed and the size of the file, this may be a short upload or a longer upload.

d. When the file is finished uploading, the screen above will close on its own (screen shot below).



6- To change your portal information and/or security settings, under your name (above red arrow), select “Update Password” or “Set Security Questions”.

7- Be sure to logoff, select your name, log out (above red arrow).

a. You don’t have to logoff per “client”, simply log off the portal and it will log you out of all your client files, within your portal.

Close your browser and you are finished uploading/downloading files!