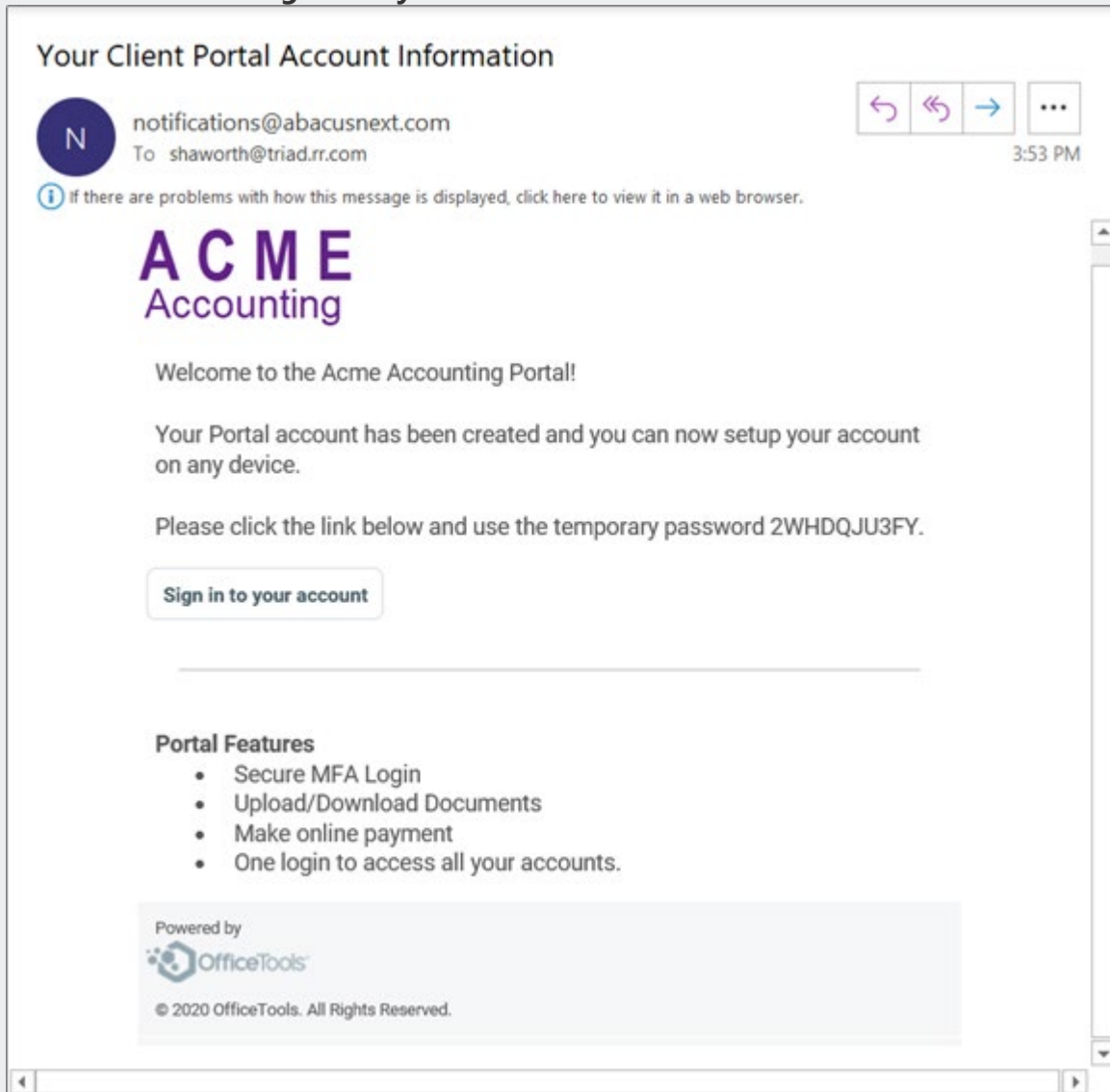



## Secure Portal Guide


### First Time Sign In

1. When you are granted access to the firm portal, a welcome email is sent to you. Open the email and click **Sign in to your account**.



**Your Client Portal Account Information**

 notifications@abacusnext.com  
To shaworth@triad.rr.com 3:53 PM

 If there are problems with how this message is displayed, click here to view it in a web browser.

# ACME

## Accounting

Welcome to the Acme Accounting Portal!

Your Portal account has been created and you can now setup your account on any device.


Please click the link below and use the temporary password 2WHDQJU3FY.

[Sign in to your account](#)

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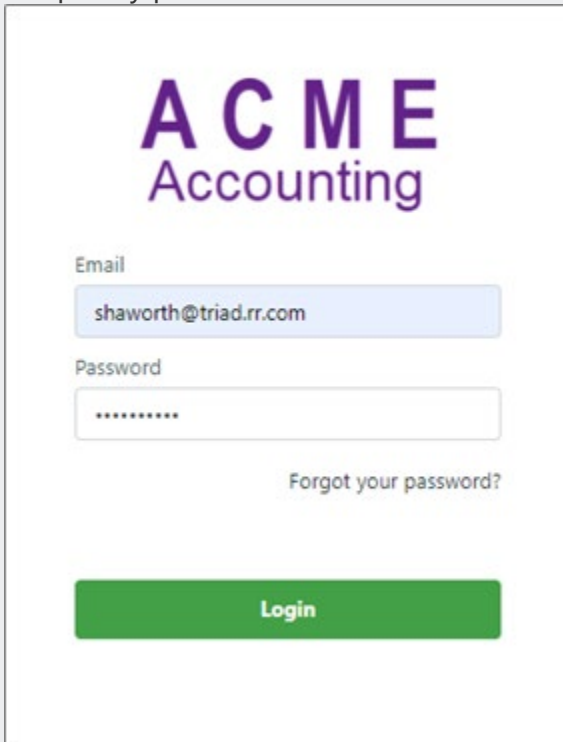
**Portal Features**

- Secure MFA Login
- Upload/Download Documents
- Make online payment
- One login to access all your accounts.

Powered by 

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2. The **Sign In** page opens in your web browser. Enter your email address and the temporary password from the welcome email. Click **Login**.



The screenshot shows a web browser window displaying the 'ACME Accounting' sign-in page. The page has a white background with the company logo 'ACME Accounting' in purple at the top. Below the logo, there are two input fields: 'Email' and 'Password'. The 'Email' field contains the text 'shaworth@triad.rr.com'. The 'Password' field contains seven asterisks. Below the password field is a link that says 'Forgot your password?'. At the bottom of the form is a green button labeled 'Login'.

3. Complete the welcome form. When creating your new firm portal password, note that the password must be at least 8 characters long and contain at least one number, one

uppercase letter, and one lower case letter. Click **Sign In**.

**Welcome !**  
Sign in by entering your information below

First Name

Last Name

Old Password

New Password

Confirm Password

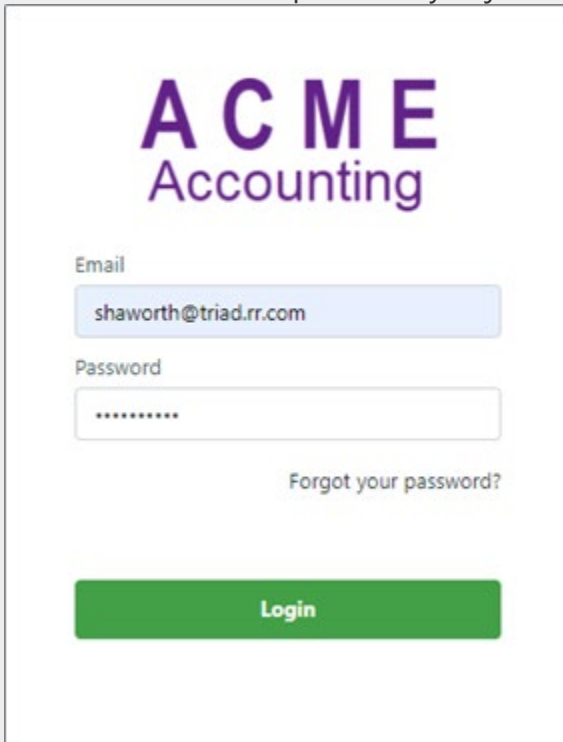
[Cancel](#) [Sign In](#)

4. Notification that your password has been changed appears. Click **Back to Login**.

**Password Update**  
Your password has successfully been updated

[Back to Login](#)

5. The **Sign In** page reappears. This time (and for any future sign in) enter your email address and the new password you just created and click **Login**.



The screenshot shows the ACME Accounting sign-in interface. At the top, the logo "ACME Accounting" is displayed in purple. Below the logo, there are two input fields: "Email" containing "shaworth@triad.rr.com" and "Password" with masked characters. A link "Forgot your password?" is positioned below the password field. A prominent green "Login" button is centered at the bottom of the form.

6. The firm portal opens.



The screenshot displays the ACME Accounting firm portal. The top navigation bar includes the ACME Accounting logo, "Privacy", "Settings", and "Logout" links. The main content area is divided into two sections: "Documents" and "Invoices". The "Documents" section is active and shows a list of three documents, each with a "Download" button. The "My Information" sidebar on the left provides user details.

| Document Name                               | Date         | Action   |
|---|--------------|----------|
| Susan Haworth Document1.docx<br>ABC Company | Dec 21, 2020 | Download |
| Susan Haworth Document2.docx<br>ABC Company | Dec 21, 2020 | Download |
| Susan Haworth Document3.docx<br>ABC Company | Dec 21, 2020 | Download |

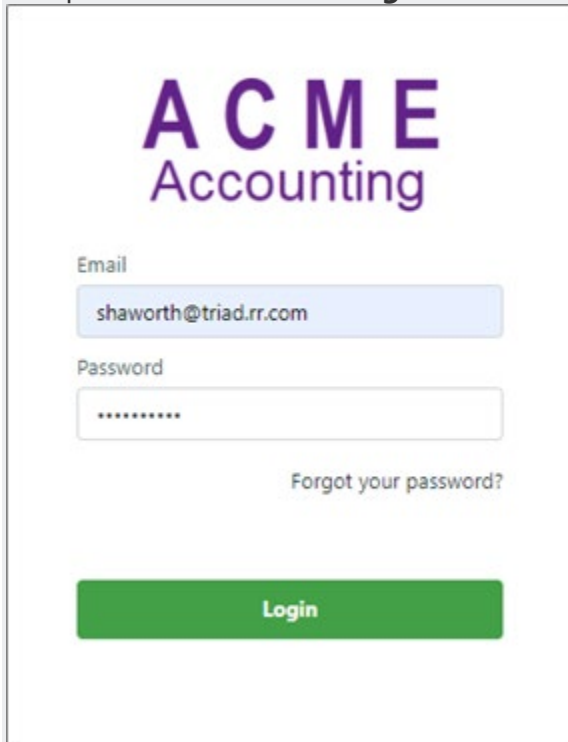
**My Information**

- Full Name: Tom Ford
- Email: shaworth@triad.rr.com
- Last Login: December 21, 2020, 11:54:58 AM

## Signing In

Signing In without Multi-Factor Authentication

From the sign in page (which appears when you are not signed in), enter your email address and password and select **Login**.



The login page for ACME Accounting features the company logo at the top. Below it are two input fields: 'Email' containing 'shaworth@triad.rr.com' and 'Password' with masked characters. A 'Forgot your password?' link is positioned below the password field. At the bottom is a prominent green 'Login' button.

The firm portal opens.

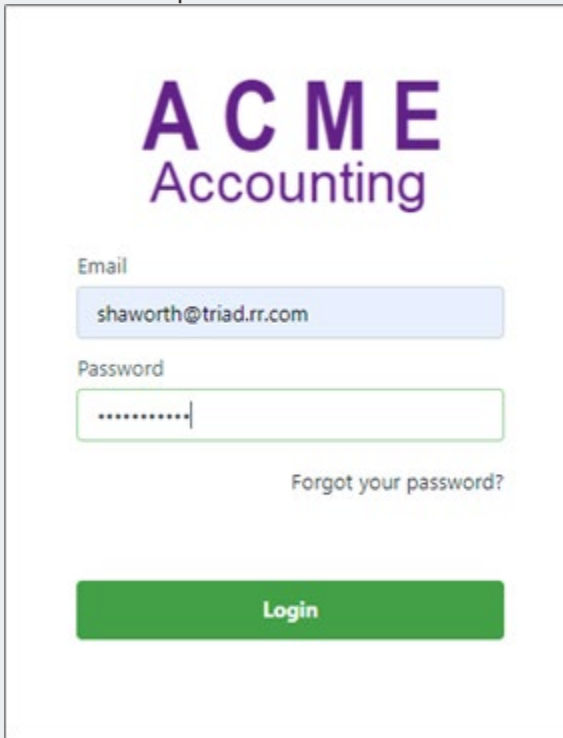


The firm portal interface includes a top navigation bar with 'Privacy', 'Settings', and 'Logout' links. The main content area is divided into a left sidebar and a right main panel. The sidebar contains 'Upload New Document' (with 'Browse File' link) and 'My Information' (showing user details like 'Tom Ford' and 'shaworth@triad.rr.com'). The main panel, titled 'Documents', displays a list of three documents, each with a 'Download' button.

| Document Name                               | Date         | Action   |
|---|--------------|----------|
| Susan Haworth Document1.docx<br>ABC Company | Dec 21, 2020 | Download |
| Susan Haworth Document2.docx<br>ABC Company | Dec 21, 2020 | Download |
| Susan Haworth Document3.docx<br>ABC Company | Dec 21, 2020 | Download |

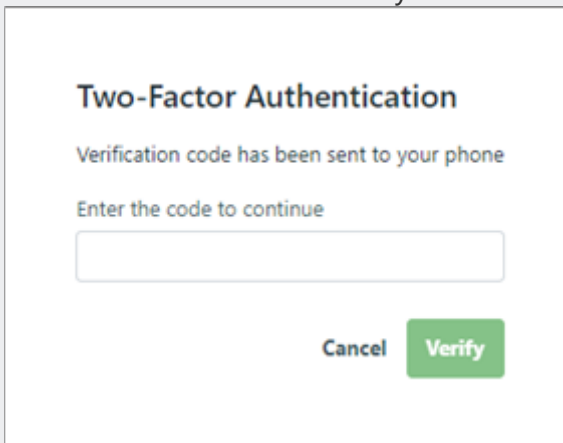
Signing In with Multi-Factor Authentication

1. From the sign in page (which appears when you are not signed in), enter your email address and password and select **NEXT**.



The login page for ACME Accounting features the company logo at the top. Below it, there are two input fields: 'Email' containing 'shaworth@triad.rr.com' and 'Password' with masked characters. A 'Forgot your password?' link is positioned below the password field. A prominent green 'Login' button is centered at the bottom of the form.

2. A verification code is sent to your mobile phone. Enter the code and select **VERIFY**.



The Two-Factor Authentication screen displays the heading 'Two-Factor Authentication' and a message: 'Verification code has been sent to your phone'. Below this, it prompts the user to 'Enter the code to continue' with an empty text input field. At the bottom, there are two buttons: a grey 'Cancel' button and a green 'Verify' button.

3. The firm portal opens.




The firm portal dashboard includes a top navigation bar with 'ACME Accounting' and links for 'Privacy', 'Settings', and 'Logout'. On the left, there is a sidebar with 'Upload New Document' (with a 'Browse File' button) and 'My Information' (showing user details like 'Full Name: Tom Ford' and 'Last Login: December 21, 2020, 11:54:58 AM'). The main content area is titled 'Documents' and lists three documents from 'Susan Haworth' at 'ABC Company', each with a 'Download' button.

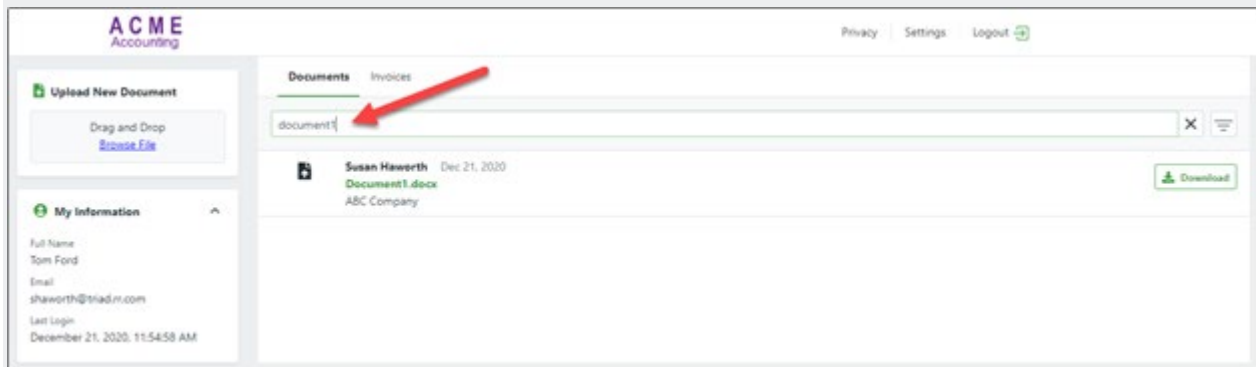
| Document Name                               | Date         | Action   |
|---|--------------|----------|
| Susan Haworth Document1.docx<br>ABC Company | Dec 21, 2020 | Download |
| Susan Haworth Document2.docx<br>ABC Company | Dec 21, 2020 | Download |
| Susan Haworth Document3.docx<br>ABC Company | Dec 21, 2020 | Download |

# Working with Documents

The firm portal displays a list of documents for your account.


## Searching for Documents

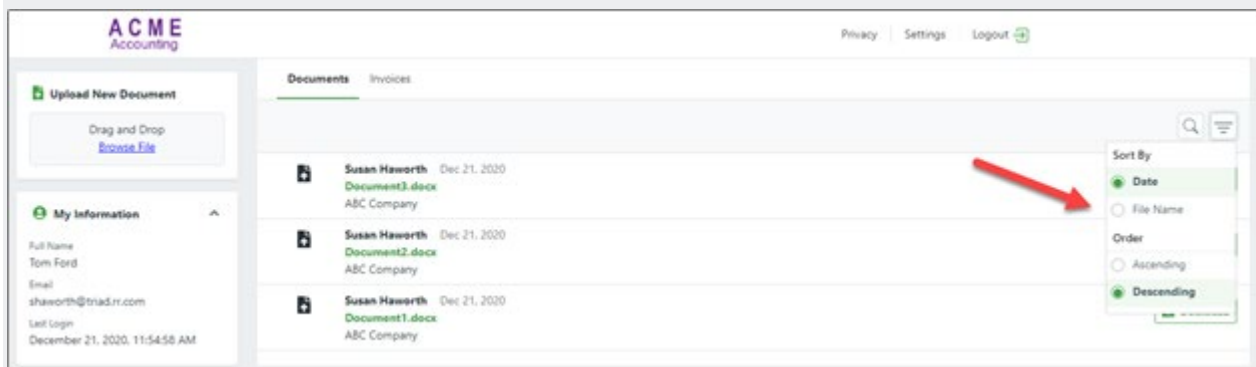
Select the search button  and enter the document name (or a portion of the document name) in the box. Documents matching the search string are listed.



Click **X** to clear the search.

## Filtering the Document List

Select the filter button . The filter menu appears. Select how you want to sort and order the document list.



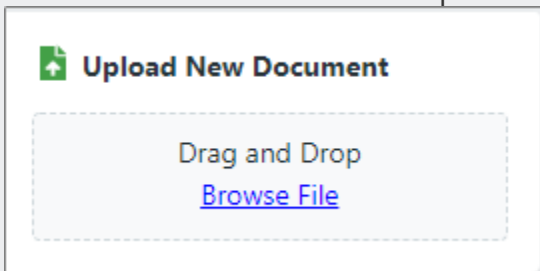
## Downloading Documents

Find the document in the list and click **Download**.

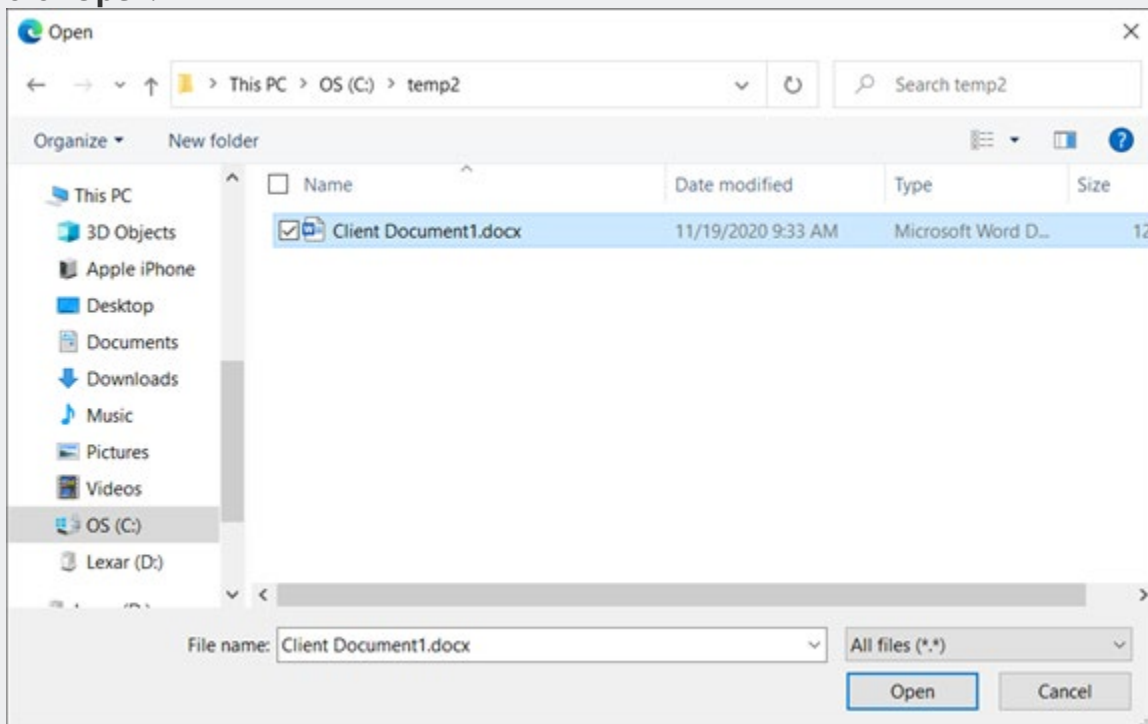


## Uploading Documents

1. In the **Uploading Documents** pane on the main window, do one of the following:
  - Find the file or files in the File Explorer and drag and drop them onto the pane.



- Select **Browse File**. From the **Open** window find and select the document and click **Open**.





2. The **Upload New Document** window appears.

**Upload New Document**

Drag and Drop  
[Browse File](#)

Client Document1.docx

ABC Company ▼ ✕ Remove

Select a document tag ▼

CANCEL **UPLOAD**

- Change the person or company as necessary.
  - If document tagging has been enabled for the firm portal, select a document tag to categorize the document.
  - Click **UPLOAD**.
3. The uploaded document is listed in the documents list on the firm portal.

**ACME Accounting** Privacy | Settings | Logout

**Documents** Invoices

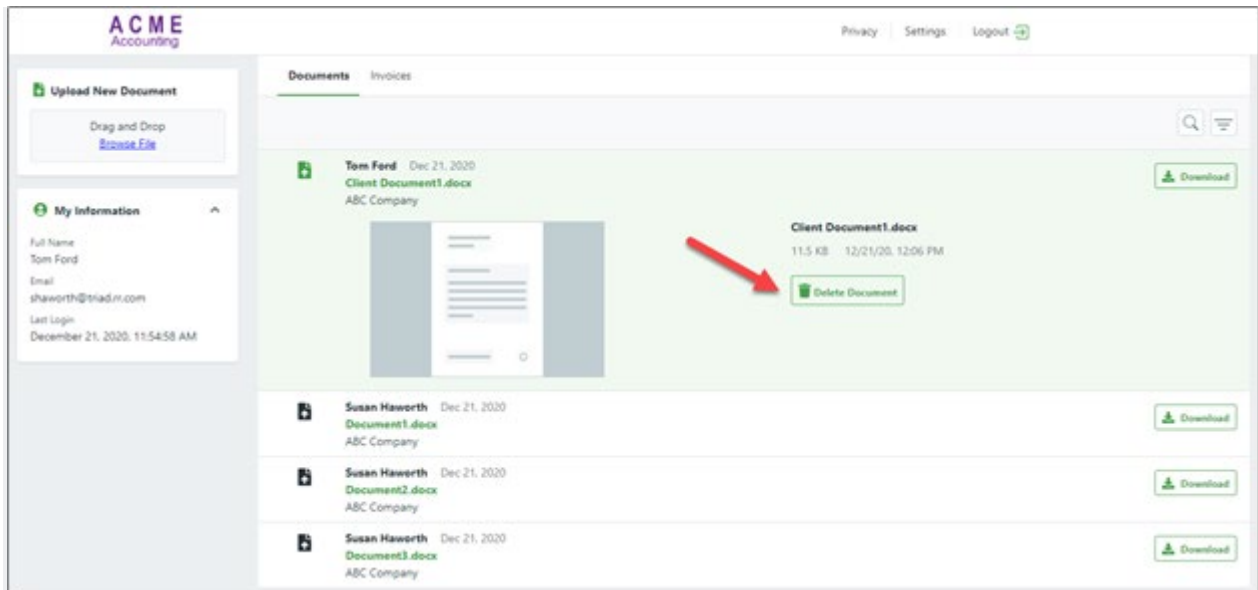
Upload New Document  
Drag and Drop  
[Browse File](#)

My Information  
Full Name  
Tom Ford  
Email  
shaworth@triad.m.com  
Last Login  
December 21, 2020, 11:54:50 AM

| Document Name         | Author        | Date         | Company     | Action   |
|-----------------------|---------------|--------------|-------------|----------|
| Client Document1.docx | Tom Ford      | Dec 21, 2020 | ABC Company | Download |
| Document1.docx        | Susan Haworth | Dec 21, 2020 | ABC Company | Download |
| Document2.docx        | Susan Haworth | Dec 21, 2020 | ABC Company | Download |
| Document3.docx        | Susan Haworth | Dec 21, 2020 | ABC Company | Download |

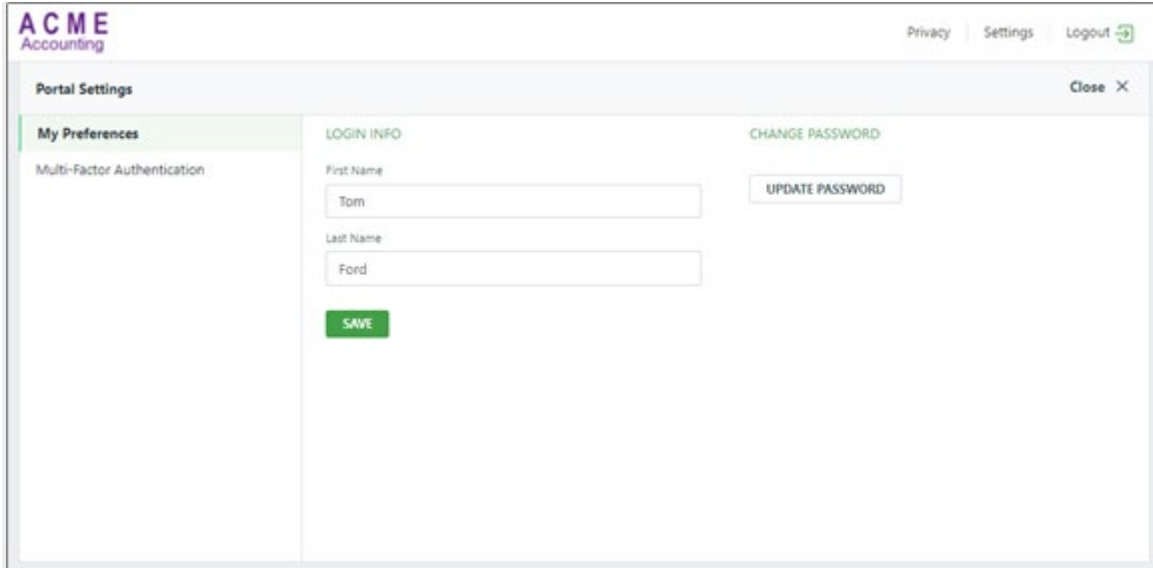
## Deleting Documents

Select the document name, then select **Delete Document**.



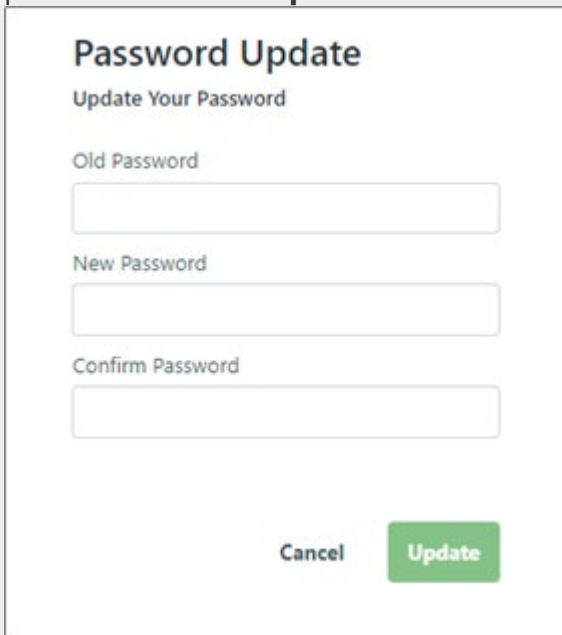
# Account Information

1. Select **Settings** and **My Preferences**.



2. To change your contact information, change your first and last name as necessary and click **SAVE**.

3. To change your password, click **UPDATE PASSWORD**. Complete the form for the new password and click **Update**.



**Password Update**  
Update Your Password

Old Password

New Password

Confirm Password

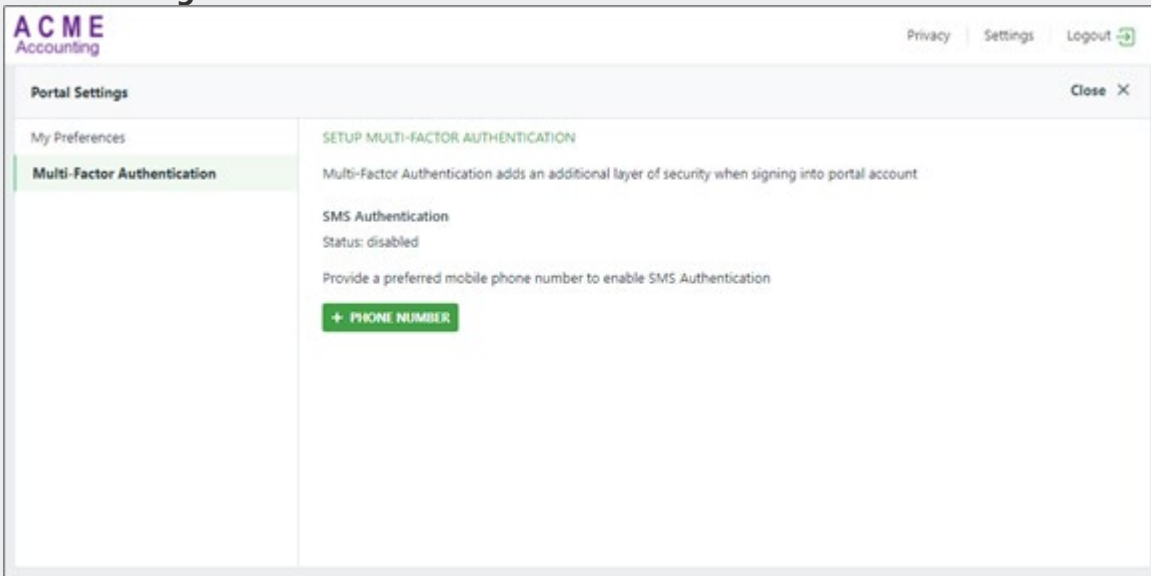
[Cancel](#) [Update](#)

## Multi-Factor Authentication

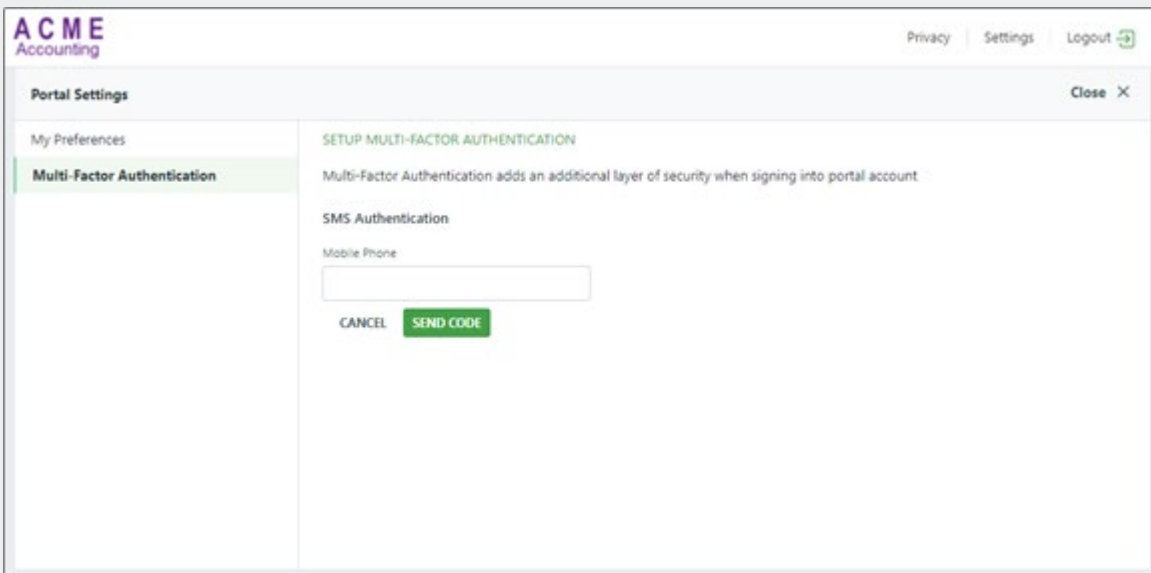
Multi-Factor Authentication (MFA) is an authentication method that requires the user to provide a verification factor to gain access to an application. Since MFA asks for more than just a user name and password, it increases security.

### Enabling Multi-Factor Authentication

1. Select **Settings** and then **Multi-Factor Authentication**.



2. Click **PHONE NUMBER** and enter your mobile phone number to receive the verification code. Enter the number with no dashes or punctuation, like this **15269875548**. Click **SEND CODE**.



- A code is sent to your mobile phone. Enter that code in the **Verification Code** field and click **SUBMIT**.

ACME Accounting

Privacy | Settings | Logout

Portal Settings

My Preferences

Multi-Factor Authentication

SETUP MULTI-FACTOR AUTHENTICATION

Multi-Factor Authentication adds an additional layer of security when signing into portal account

SMS Authentication

We just sent a text message with a verification code

Verification Code

CANCEL SUBMIT

- MFA is enabled for your account and you will be prompted to enter a code each time you log into the portal.

ACME Accounting

Privacy | Settings | Logout

Portal Settings

My Preferences

Multi-Factor Authentication

SETUP MULTI-FACTOR AUTHENTICATION

Multi-Factor Authentication adds an additional layer of security when signing into portal account

SMS Authentication

Status: enabled

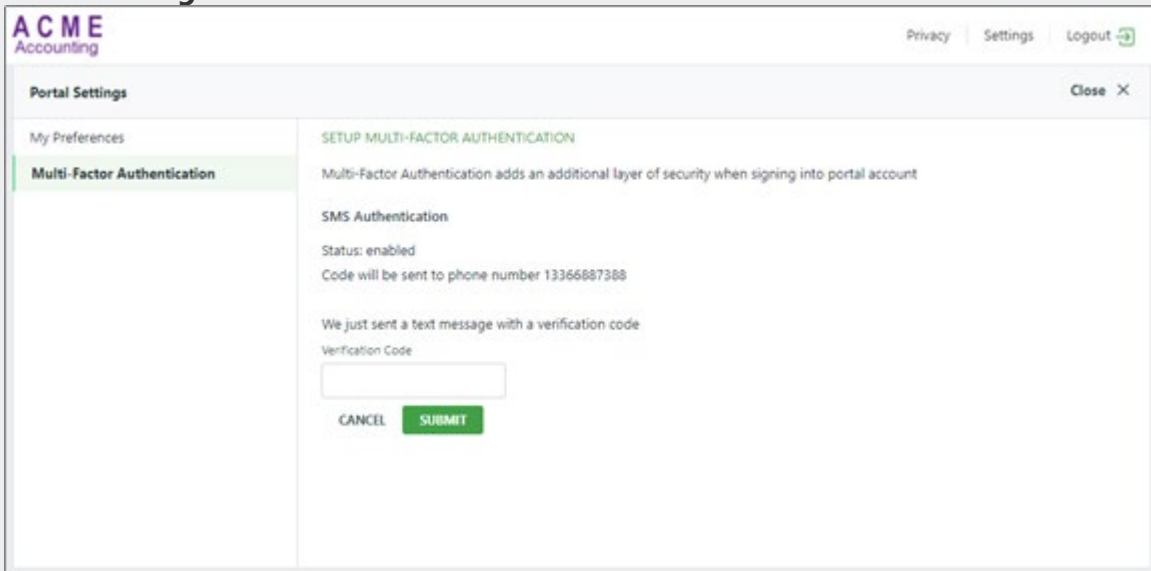
Code will be sent to phone number 13366887388

Provide a verification code to disable SMS Authentication

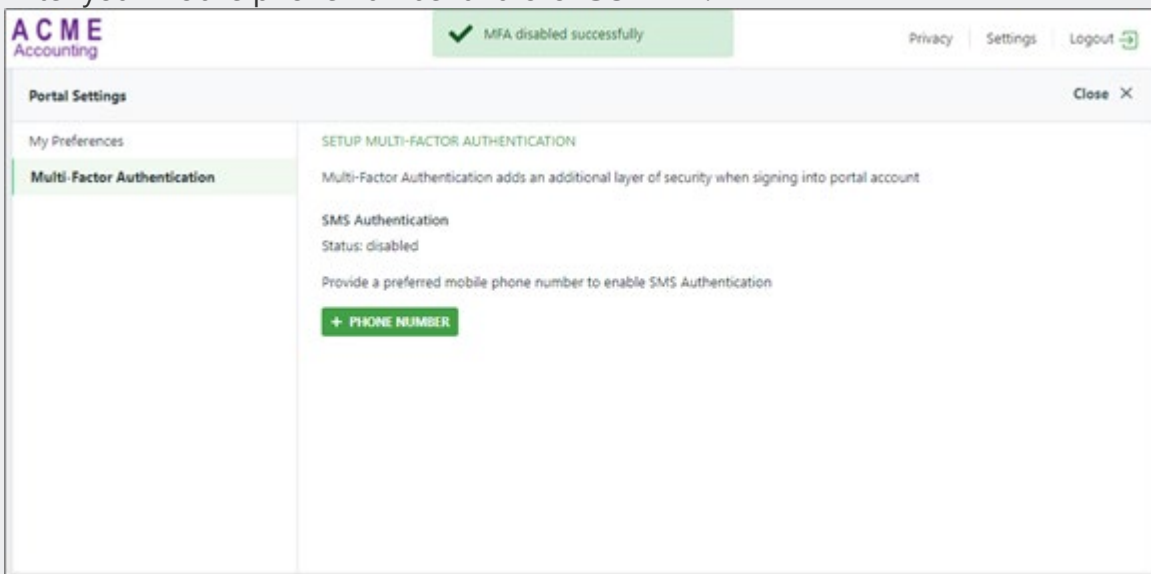
Disable MFA

## Disabling Multi-Factor Authentication

1. Select **Settings** and then **Multi-Factor Authentication**.



2. Enter your mobile phone number and click **SUBMIT**.



## Signing Out

Select **Logout** in the upper right corner.

