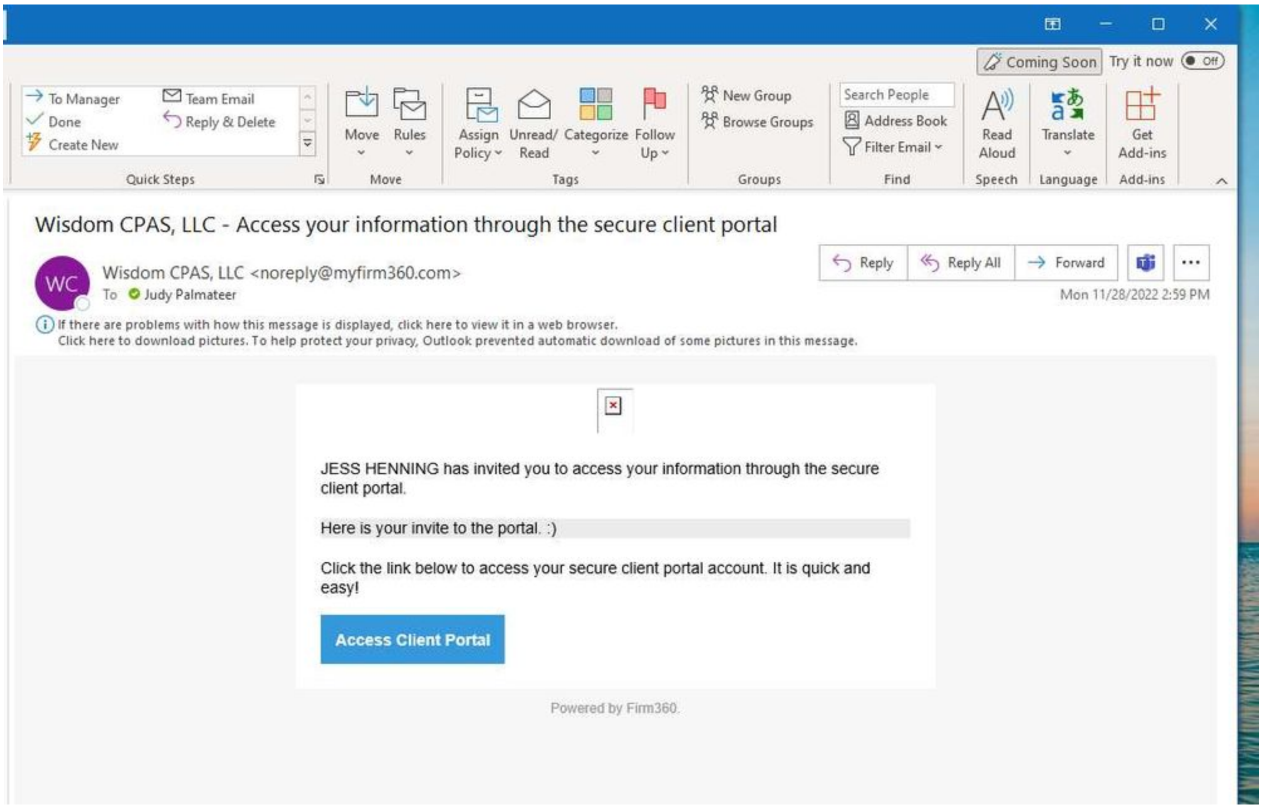
Firm 360 Client Portal Instructions

Here you will find step by step instructions on how to utilize the Client Portal. Please be sure to update any outdated information with our office personnel, (IE: phone number and email address), to ensure your complete access to make this tax season a breeze for us all! :)

1 Check E-Mail

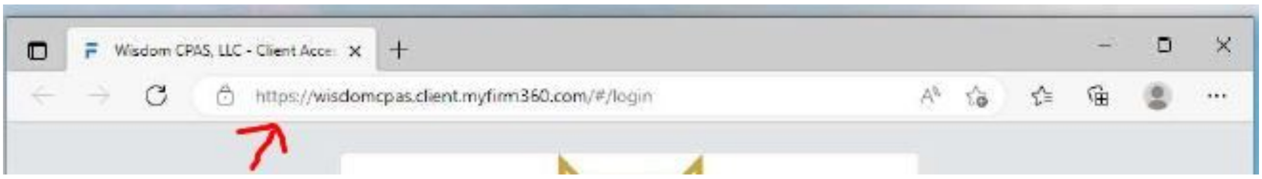
Check your email for a "Access your information through the secure client portal"

Click "Access Client Portal" in the blue box.



2 Save URL

Once you click "Access Client Portal" you will be taken to a sign in page, you will want to save this web address to your favorites for future access.



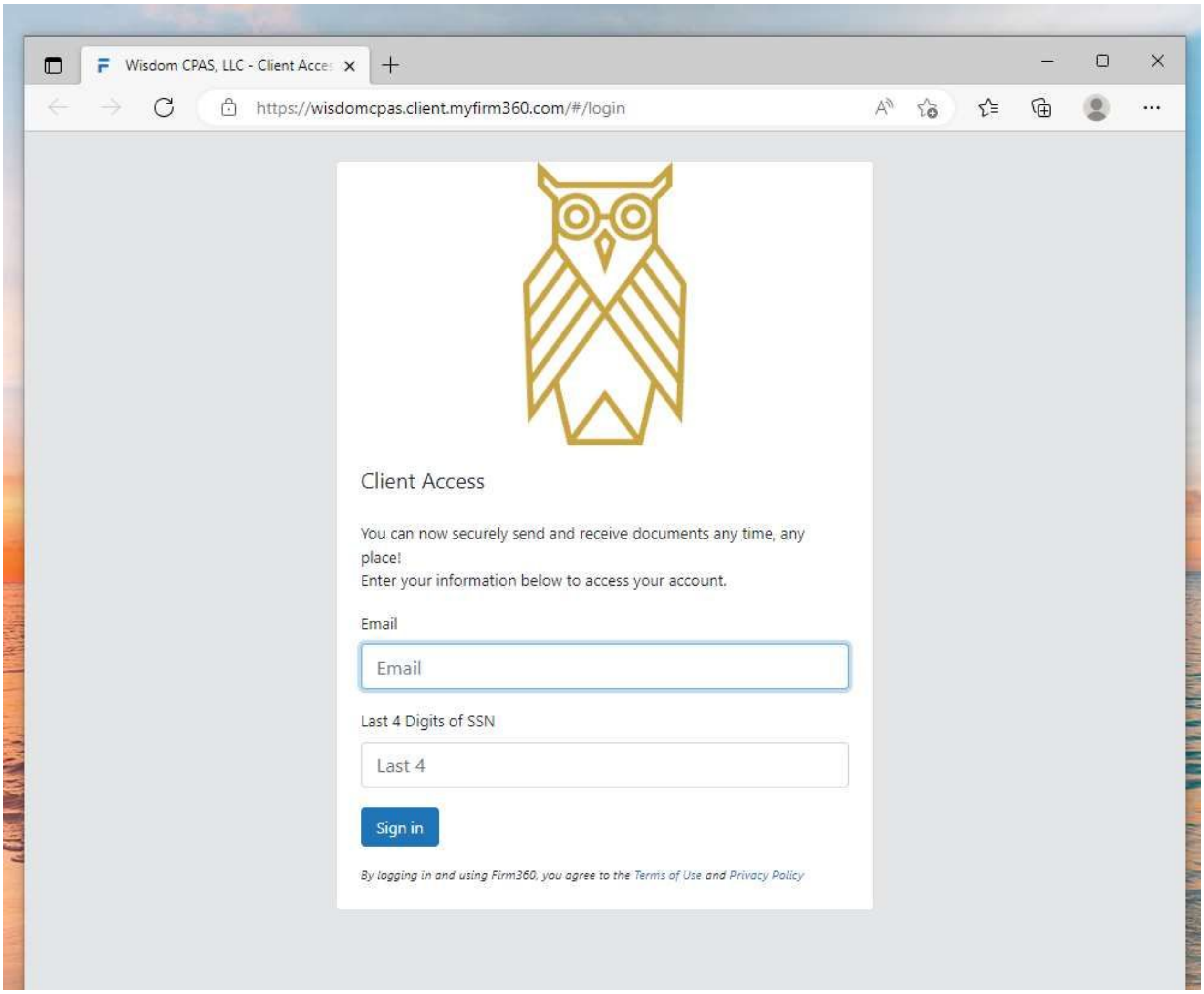
3 Saving to Browsers

If you are unsure how to save the URL for your browser, click the link below for instructions.

Please Click Here for instructions for your browser.

4 Enter your E-mail and last 4 digits of your SSN.

Here you will be prompted to type in your E-mail and last 4 digits of your SSN.

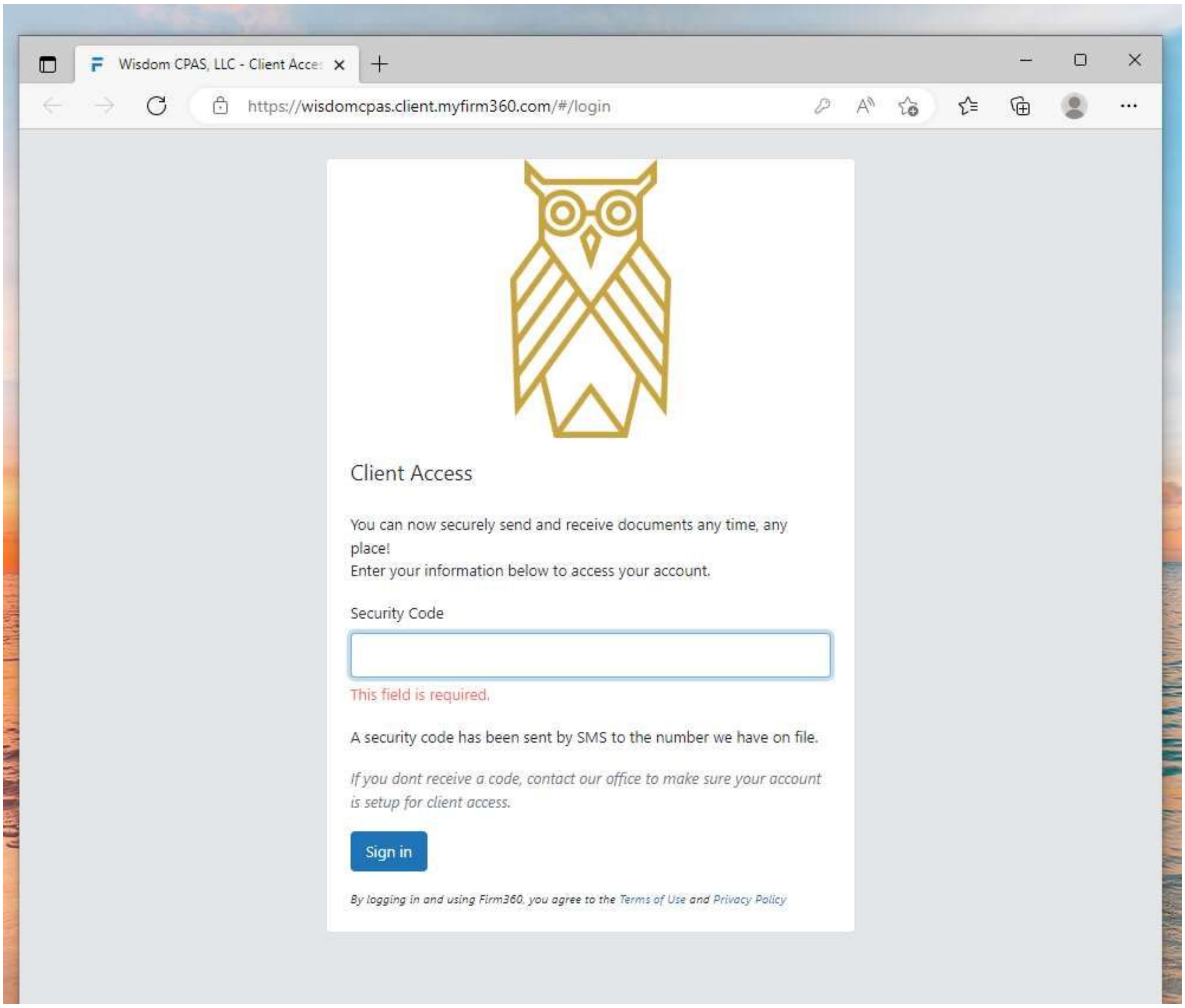


5 Code sent to phone

To ensure you are getting codes sent to the correct number, make sure you verify with our team that your information is up-to-date in our system.

If your number is up-to-date once you inserted your E-mail and SSN you will then receive a code you will need to enter before selecting "Sign in".

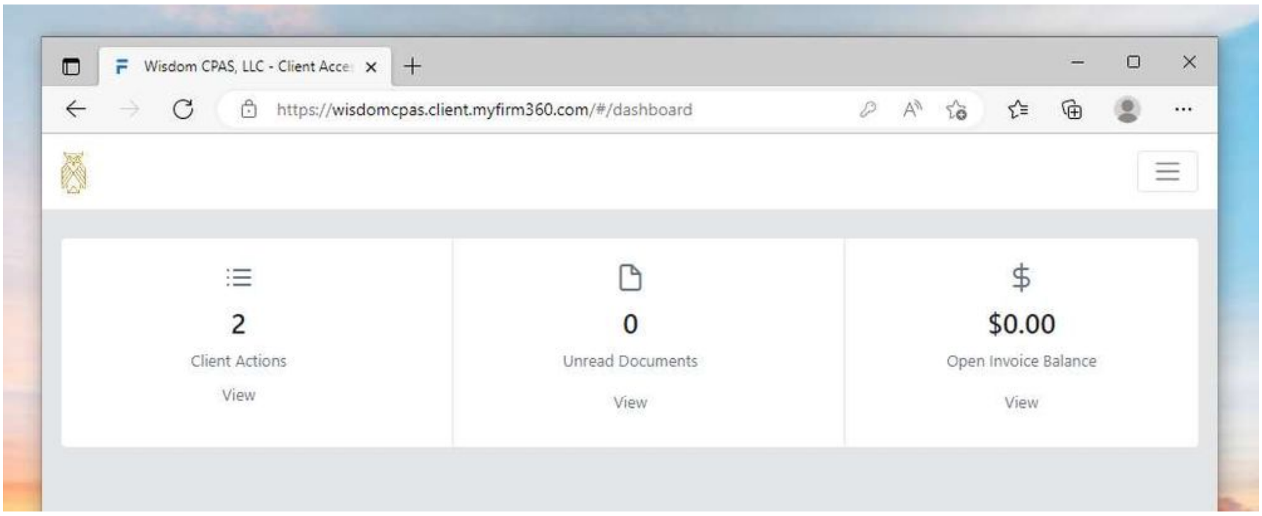
If no code is received, please call our office 785.742.7825 for assistance.



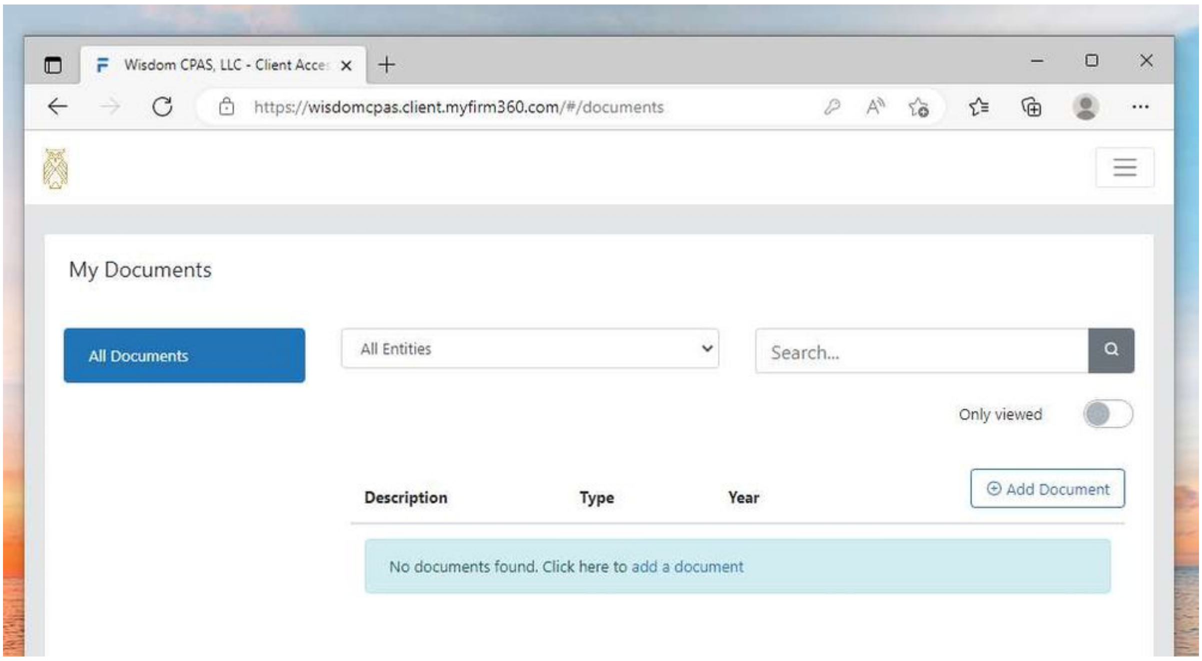
6 Welcome to our portal!

The three sections are: "Client Actions", "Documents" & "Invoices".

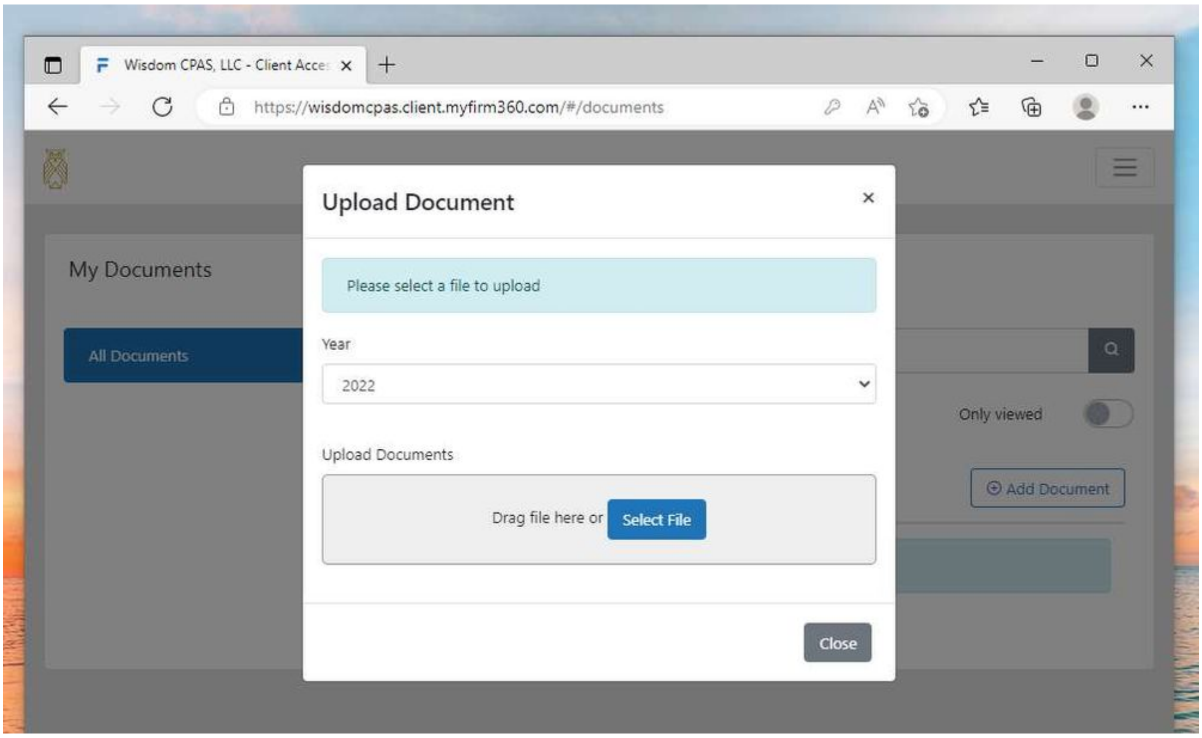
1. Client Actions includes any document we need you to complete (example: Tax Questionnaire, Engagement Letter, etc.) Once you completed the Action, we will be notified that it is complete.
2. Documents will show any documents you previously uploaded and documents we sent to you.
3. Invoices will show invoices previously paid or yet to be paid.



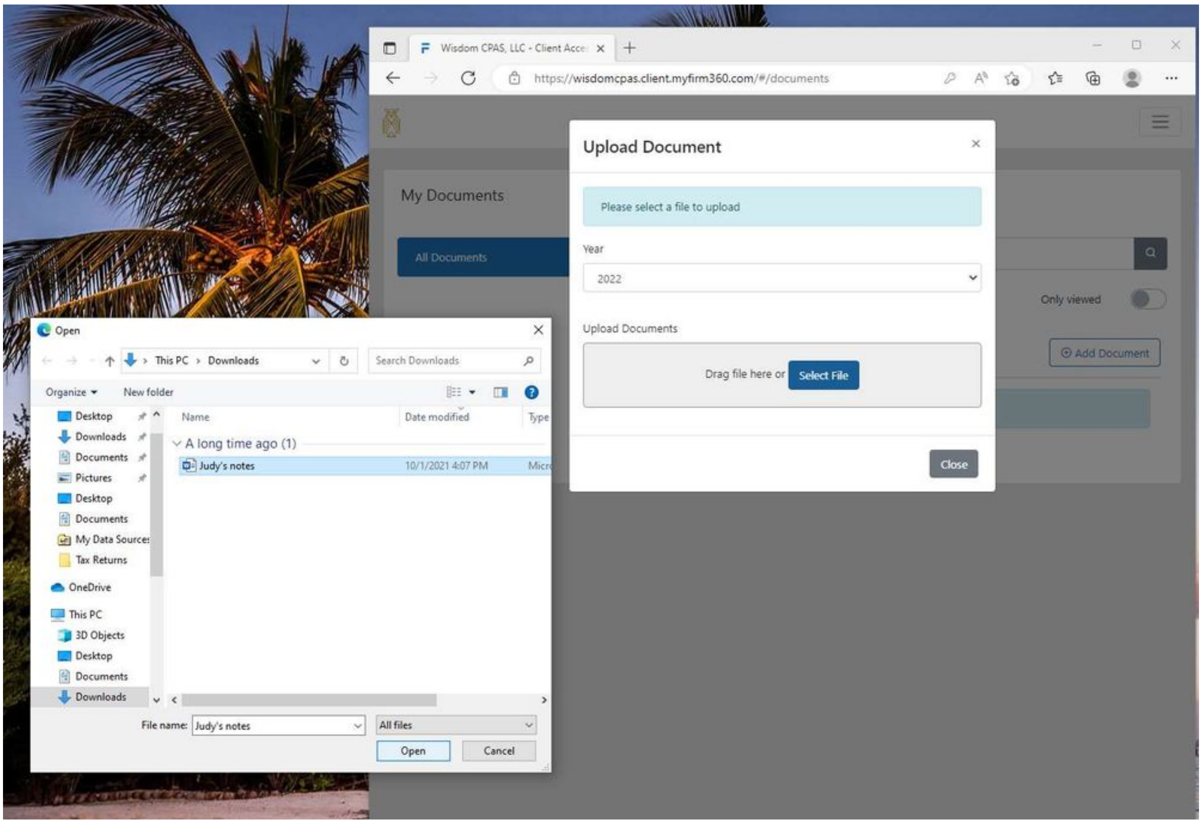
7 Upload a Document

- If you are using the Portal to upload a document for the team to view you will need to make sure you have the documents available in a folder on your computer. You will then want to click on "unread documents" where you will be prompted to the following screen shown below.From this screen you want to click "add document".
- 

Here you will be prompted to "Select File", you will want to click that and find the document you are wanting to upload where you saved it on your computer.



- When uploading your document make sure you have the appropriate year selected.

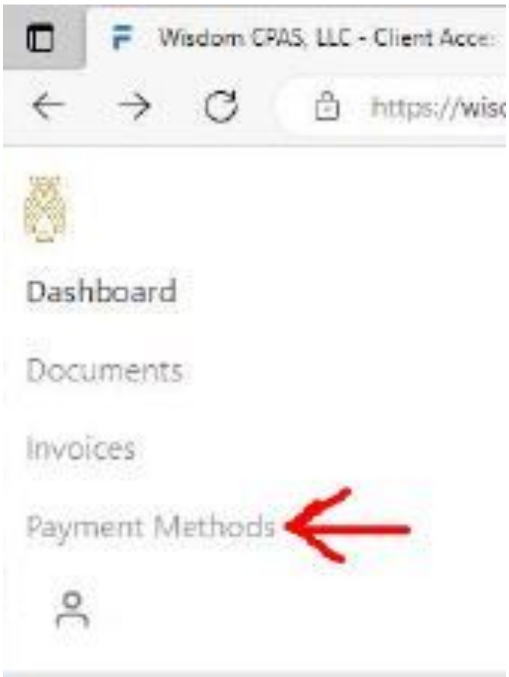


8 Payment Method

To change or add a payment method you will want to selece the 3 lines at the upper right corner of the screen.

Here you will be given 3 options, "Documents", "Invoices", ""Payment Method".

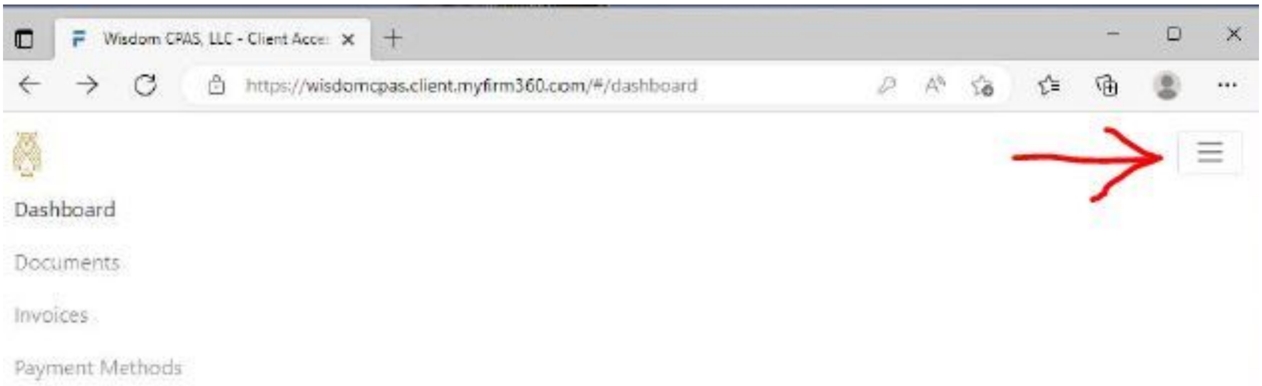
Select payment method and follow the prompts from there.

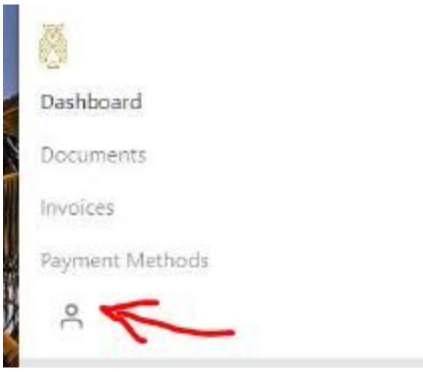


9 Logging out

Once you are finished uploading documents or viewing your invoice you want to make sure you log out.

To do this you want to click on the 3 lines in the upper right corner, here you will see "Documents", "Invoices", "payment methods" and then a little person.





You want to select the little person and select Logout.


Logout