



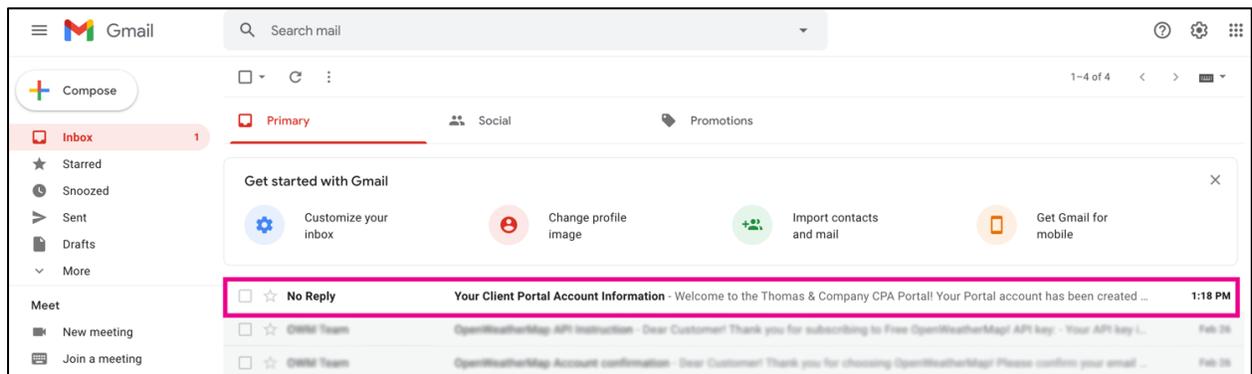
Client Portal Guide

Logging in for the First Time

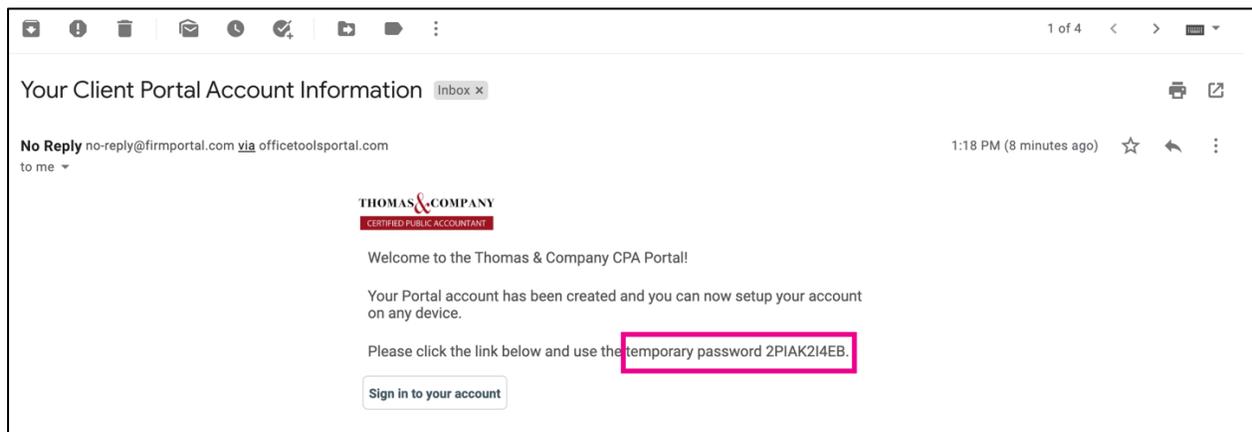
STEP ONE:

Locate the email & your temporary password

When you check your email, you should see a message from “No Reply” titled *Your Client Portal Account Information*.



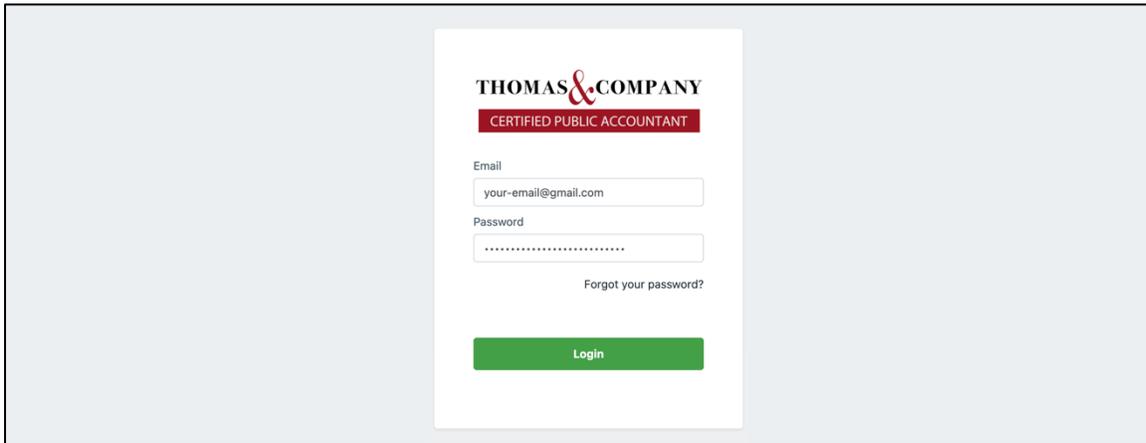
In this email, you'll find a **temporary password** as well as a button titled “Sign in to your account”. When you're ready, press this button.



STEP TWO:

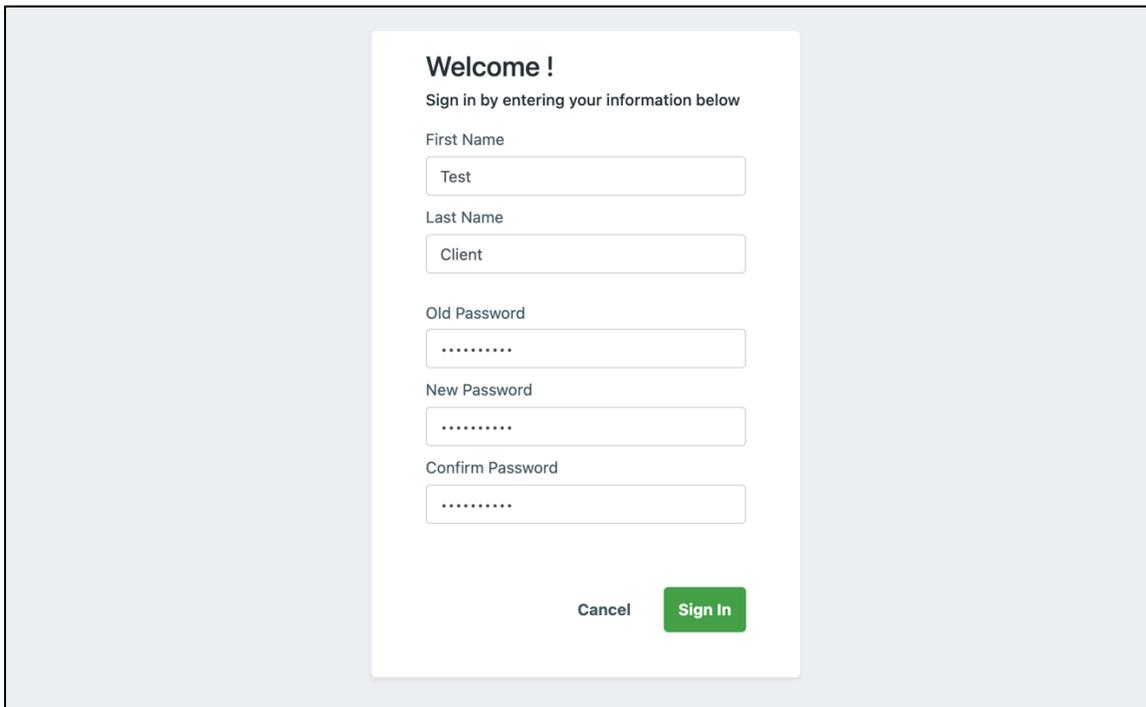
Sign in with your temporary password, then create a new password.

Once you press the button in the email, you'll be redirected to our portal login page. Log in using your **email** and the **temporary password** sent to you (you can copy/paste this).



The screenshot shows a login form for Thomas & Company, a Certified Public Accountant. The form is centered on a light gray background. At the top, the company logo "THOMAS & COMPANY" is displayed in a serif font, with "CERTIFIED PUBLIC ACCOUNTANT" in a red box below it. The form contains the following elements: an "Email" label above a text input field containing "your-email@gmail.com"; a "Password" label above a text input field with masked characters "....."; a "Forgot your password?" link below the password field; and a green "Login" button at the bottom.

Next, you'll be prompted to enter your name, your old password (the temporary password sent in the email), and a new password. You'll use your email and new password to sign into your portal in the future.



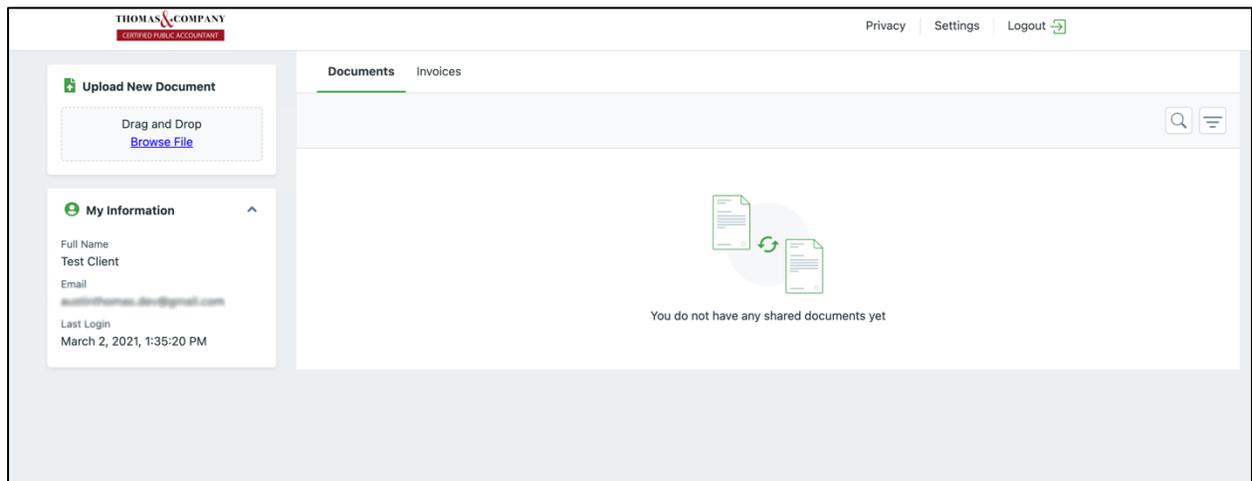
The screenshot shows a sign-in form titled "Welcome !" on a light gray background. Below the title, it says "Sign in by entering your information below". The form includes the following fields: "First Name" with a text input field containing "Test"; "Last Name" with a text input field containing "Client"; "Old Password" with a text input field containing "....."; "New Password" with a text input field containing "....."; and "Confirm Password" with a text input field containing ".....". At the bottom of the form, there are two buttons: a "Cancel" button and a green "Sign In" button.

STEP THREE:

Log into the portal with your new password.

Once you've completed the form from the previous step, you'll receive a message telling you that your password has successfully been updated, along with a button that takes you back to the login page.

Follow that button and log in once again with your email, this time with the new password you just created.



Congratulations! You've just logged into your Secure Client Portal for the first time!