



### Introduction to myCSVaccess Portal

This Guide is designed for users who will have access to the myCSVaccess (via NetClient CS). The myCSVaccess portal provides a solution for you and CarlsonSV to share and exchange electronic files securely and quickly. It also allows a reduction in waste by corresponding electronically instead of handling paper. Unlike emails and their attachments, the myCSVaccess portal uses encryption technology so you and will have confidence knowing that the information is secure when transferred back and forth.

There are two sections to the myCSVaccess portal: ClientFlow and File Exchange. The ClientFlow and File Exchange sections are explained below with instructions.

### System Requirements for using the myCSVaccess Portal

To access and use the myCSVaccess portal, you need high-speed internet access. Also, myCSVaccess (via NetClient CS) recommends the use of a web browser with a minimum of 128-bit encryption.

**For more detailed system requirements, please visit the website below for the latest requirements:**

<https://cs.thomsonreuters.com/support/systemrequirements/portals.aspx>

### Accessing myCSVaccess Portal

To access myCSVaccess portal, CarlsonSV will create an account for you. You will then receive a notification email **directly from register@netclientcs.com** which will contain a link (or URL address to copy and paste into the browser) to create a login and register your account. If you do not receive an email, please check your spam folder and then contact CarlsonSV (see contact info at the end of this document).

- 1) Once the email has been received go to the registration website and follow these steps:
  - a) Enter your email address in the Create Login field
  - b) Enter a password in the Enter Password field
  - c) Re-enter the password in the Confirm Password field

### Important Information about your Login and Password:

- The password must be at least seven (7) characters long and must include letters and numbers. You can also use symbols.
- Passwords are case sensitive.

**Note:** If you have any questions or issues with accessing your myCSVaccess user account, contact CarlsonSV (see contact info at the end of this document).

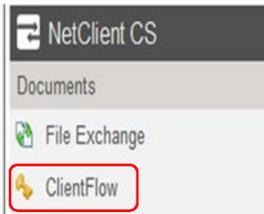
**Note:** For future access to login to myCSVaccess after your initial login, visit CarlsonSV's website ([www.carlsonsv.com](http://www.carlsonsv.com)) to link to the site, or save the site as a Favorite in your browser.

- 2) After successfully registering your myCSVaccess account, confirm that your email address is in the Login field and enter the password that you just created and click Login.

## Using ClientFlow

The ClientFlow section of the myCSVaccess portal (via NetClient CS) is generally used for CarlsonSV to securely allow you access to your prior year returns or other documents that may be requested by financial institutions. You may also use it to upload files to CarlsonSV, unless you are an audit client, which you would then utilize File Exchange to upload documents into designated folders. Common file types that are uploaded through ClientFlow have the following extensions: pdf, xls, xlsx, doc & docx. (Note: Quickbook files should not be uploaded using ClientFlow, and instead should be uploaded using File Exchange, which is explained further in this document.) The ClientFlow section can be used to upload your tax organizer with tax supporting documents (W2, 1099s, etc). Below are instructions on how to use the ClientFlow section of the myCSVaccess portal:

1. On the left side under the NetClient CS menu click on ClientFlow.



2. Click on the folder that is associated with the Client Name. You will see a separate folder for each Company you are associated with.

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 CarlsonSV		3/19/2020 7:09 AM

3. Click on any file to view the file.

**Note:** Files opened from ClientFlow are READ-ONLY and therefore cannot be edited and saved back to ClientFlow. If the file requires editing, save a copy to the local drive, edit it as necessary, and then upload it back to ClientFlow (uploading is discussed in the next steps).

4. Click on HOME or UP icons to return back to the list of Client Name folders.



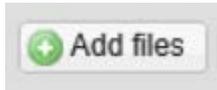
5. Click on folder that is associated with the Client Name.

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6. Click on Upload to upload a file to ClientFlow.



7. An upload window will open. Click on the Add Files button to search for the location of the files to upload. Highlight file(s) to upload and click Open. You can select multiple files at a time.



8. In the Choose file window, select the file(s) to upload and click on the Open button. Alternatively, you can also drag files into the upload window. The file(s) will show up in the Upload window as pending.



9. Click on the Start Upload button to upload the file to ClientFlow.



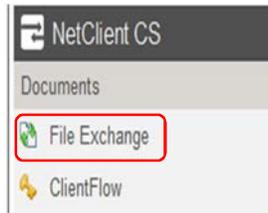
**Note:** CarlsonSV will be automatically notified when a you upload a file to myCSVaccess.

After viewing or *uploading* files, click on your name and then Log Out to end your session.

## Using File Exchange

The File Exchange section of the myCSVaccess (via NetClient CS) is generally used to transfer backup files of QuickBooks, Peachtree and other accounting applications that can't be transferred through the ClientFlow section. The firm also utilizes File Exchange for its audit clients to upload documents into designated folders. Below are instructions on how to use the File Exchange section of the myCSVaccess portal:

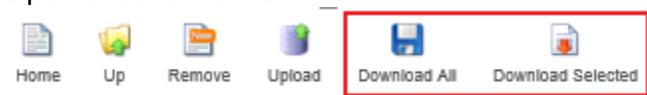
1. Under Document Management click on File Exchange to open the application.



2. Click on folder that is associated with the Client Name.

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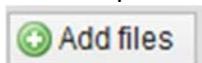
3. To download documents, click the checkbox(es) next to the file(s) and select Download All or Download Selected, depending on the file(s) you wish to download. You will be prompted to Open or Save the file.



4. Click on Upload to upload a file to File Exchange.



5. An upload window will open. Click on the Add files button and browse for the location of the files to upload. Highlight file(s) to upload and click Open. You can select multiple files at a time.



6. The selected file(s) will show up in the upload window. Click on the Start upload button to upload the file(s) to File Exchange.



7. Once the files are uploaded all the files will appear in the folder and an email will be sent to the accountant you are working with to notify them that files were uploaded.
8. After uploading your files, click on your name and then Log Out to end your session.

#### Contact Information for Support of myCSVaccess

Should you require additional assistance regarding your myCSVaccess portal, please contact [portalsupport@carlsonsv.com](mailto:portalsupport@carlsonsv.com).