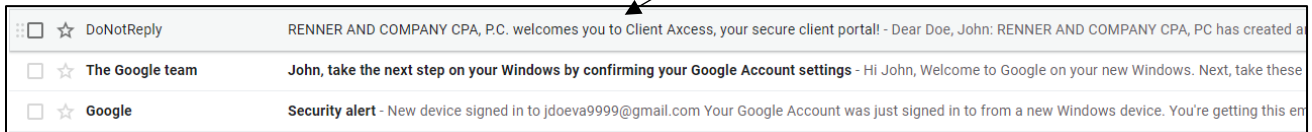




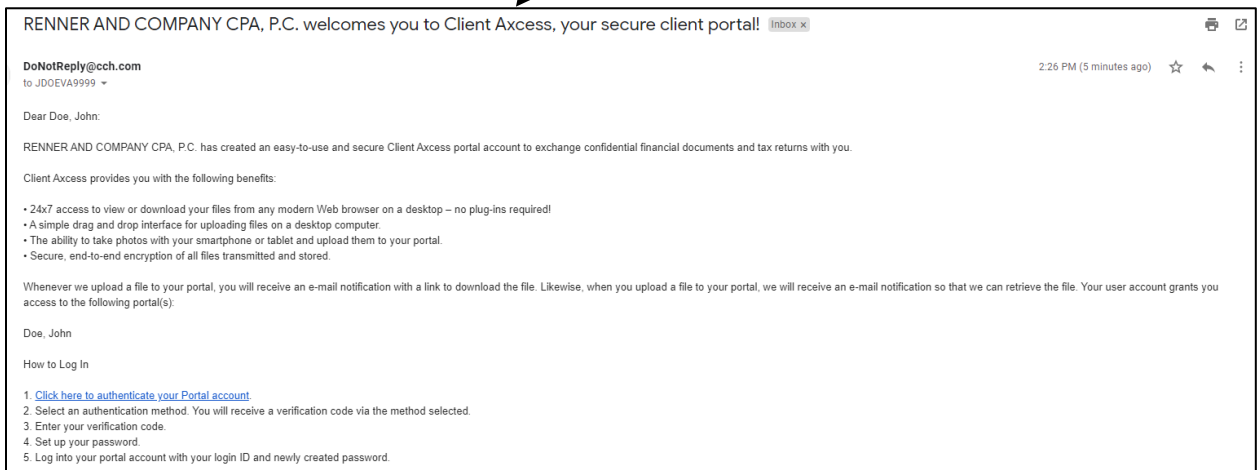
Renner & Company Client Portal Guide

Welcome to the Renner Client Portal. This guide will walk you through setting up and using your portal. After you request a portal, you will be sent an email to begin the set-up process.

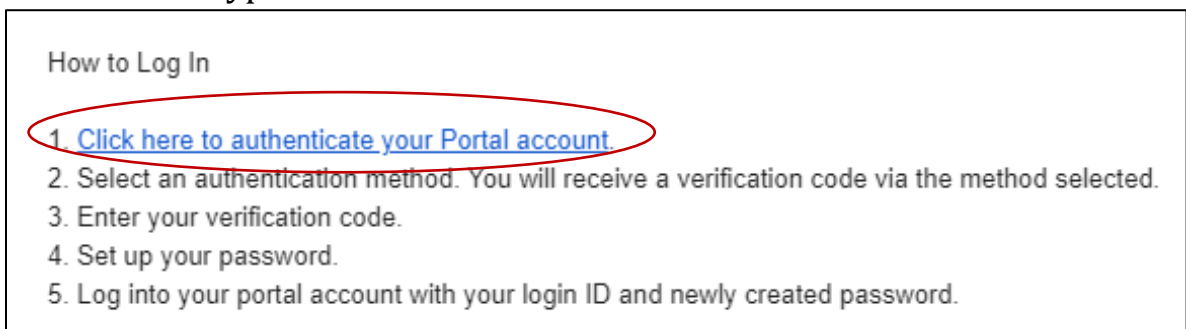
1. Check your email. Your message will look like this



2. Open the email. It will look like this



3. Click on this hyperlink



4. It will take you here. Click on “Send the Code” and keep your browser window open.

Verify Your Identity
For added security, we need to verify your identity. You will receive a one time code to be used to verify your identity.

How do you want to get the code?

Email to
jd*****@gm*****

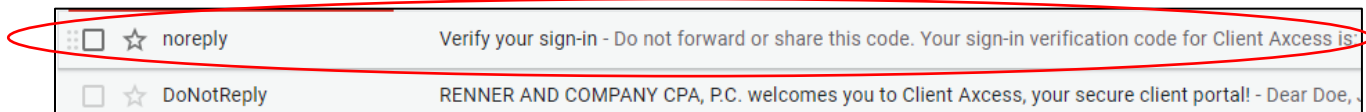
Text message to
Message and data rates may apply

Voice message to

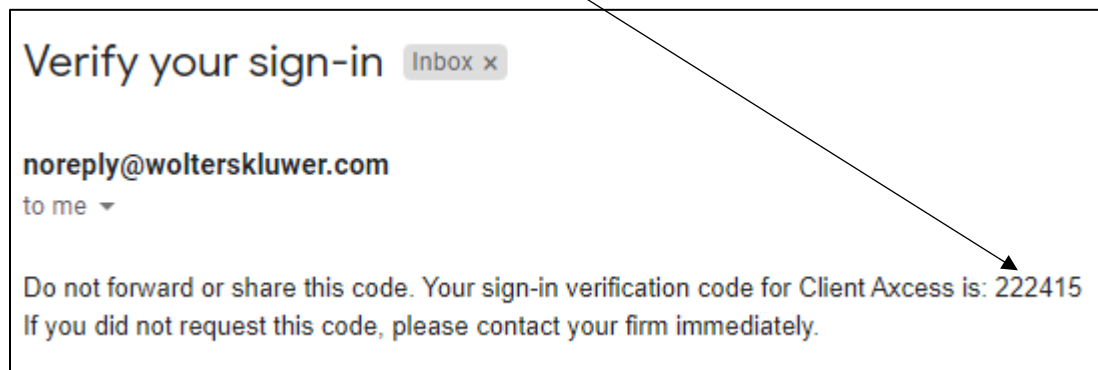
Send the Code

This code will expire in 5 minutes

5. You'll get message like this.



Open it, and you'll have a code



6. Go back to browser window and enter the code

Verify Your Identity

For added security, we need to verify your identity. You will receive a one time code to be used to verify your identity.

Enter the code

222415

Submit

Didn't get the code? [Resend](#)

Trust this device for 90 days
Uncheck if this is a public device

7. After inputting the code, you'll be prompted to set a password.

Set password

New Password

Must be between 8-32 characters
Must contain at least one number
Must contain at least one special character
Must contain one uppercase letter

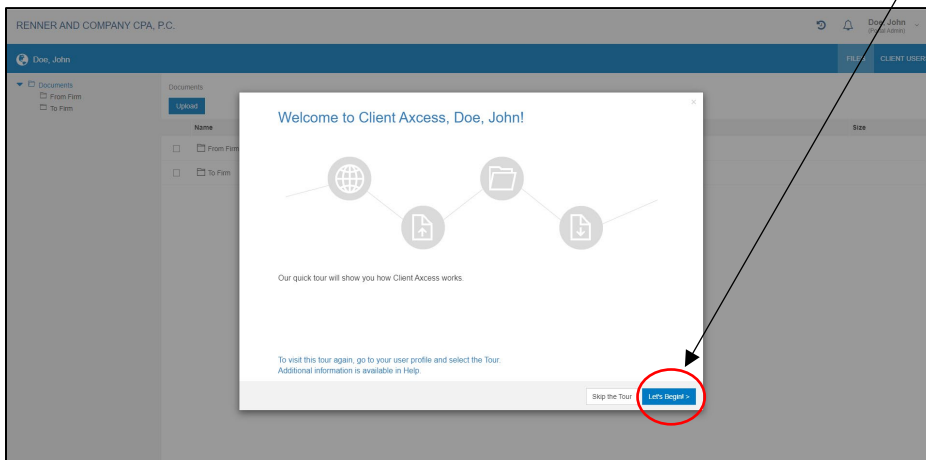
Confirm Password

Cancel Save

- Use your email address as login and the password you just set to enter the portal and, if prompted, enter a phone number for secondary authentication.

The image shows two side-by-side forms. The left form is titled "Welcome!" and contains a "User ID" field with the placeholder "Enter your user ID", a "Password" field with the placeholder "Enter your password", a checkbox labeled "Save User ID", a link for "Forgot password?", and a blue "Log In" button. At the bottom, it says "© 2021, CCH Incorporated and its affiliates. All rights reserved." and "V 3.3 271306". The right form is for profile updates, with fields for "Daytime Country Code" (United States (1)), "Daytime Phone Number" (XXX-XXX-XXXX), "Evening Country Code" (United States (1)), and "Evening Phone Number" (XXX-XXX-XXXX). It has a blue "Update" button and a link that says "Skip, I'll enter a phone number next time".

- At this point, you will be in the portal and can begin the how-to walkthrough, which is very helpful. Click through it, slide by slide.



Your Portal

Client Access helps you share files securely and privately in locations known as "portals." If you have access to one portal, that portal opens automatically.

R&R Accounting Mark (Portal Admin)

Huffman Trucking FILES CLIENT USERS

Documents

- From Firm
- To Firm
- Misc Files
- Shared with...

Upload

Name	Expiration Date	Date Modified	Modified By	Size
From Firm				
From Firm				

Features displayed based on full permissions.

[Back](#)

Close the Tour

Next: Selecting a Portal >

Selecting a Portal

If you have access to multiple portals, you can choose a portal from the **Select a portal** list or use **Search** to find a portal.

R&R Accounting Mark (Portal Admin)

Select a portal FILES

Search for a portal

RECENT

- Huffman Trucking
- Riordan Manufacturing

Features displayed based on full permissions.

[Back](#)

Close the Tour

Next: Add Files >

Add Files

There are two ways to add files to a portal. Select a folder in the navigation pane, and then click **Upload**. Or drag files from your computer to a folder. Click **Upload All** in the Upload Queue to complete.

Huffman Trucking FILES CLIENT USERS

Documents / From Firm

Upload

Upload Queue

Portal	Name	Size	Progress	Status	Actions
Huffman Trucking Doc...	2018Huffman Governes...	0.51 MB			Upload Remove

Upload All Remove All

Features displayed based on full permissions.

[Back](#)

Close the Tour

Next: More File Actions >

More File Actions

To perform other file tasks, select a file's check box, and then click the **More Actions** button.

Name	Date	Date Modified	Modified By	Size
2016Huffman Gov	11/01/2016	11/01/2016	ginadegnan@gmail.com	0.51 MB

Features displayed based on full permissions.

[Back](#)

Close the Tour

Next: Folder Actions >

Folder Actions

Select a folder's check box and then click the **More Actions** button to perform folder tasks.

Name	Expiration Date	Date Modified	Modified By	Size
From Firm				

Features displayed based on full permissions.

[Back](#)

Close the Tour

Next: Add Client Users >

Add Client Users

To add users to a portal, click **Client Users** on the banner bar, and then click **Add New User**.

Last Name	First Name	Email	Grant Access	Access Expiration
Huffman	Clark	chuffman@gmail.com	<input checked="" type="checkbox"/>	<input type="text"/>
Huffman	Elizabeth	bethhuffman@gmail.com	<input checked="" type="checkbox"/>	<input type="text"/>
Huffman	Mark	huffman@gmail.com	<input checked="" type="checkbox"/>	<input type="text"/>

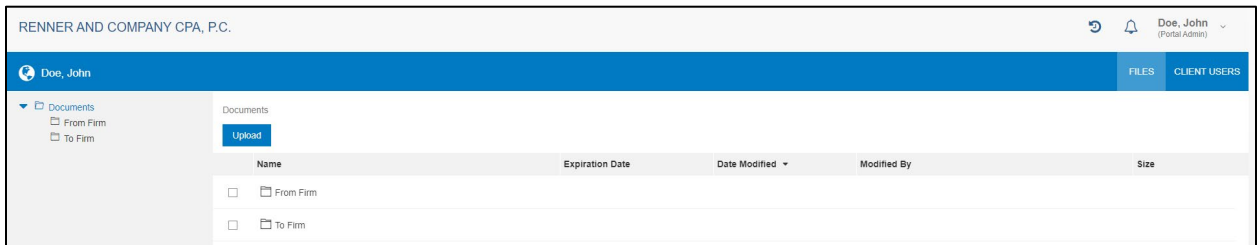
Features displayed based on full permissions.

[Back](#)

Finished!

What's new in this release

10. After going through the tutorial, you'll be left at this screen and can start uploading and downloading files from your Renner Client Portal!



Accessing Your Portal

You can access your portal at <https://www.clientaccess.com/#/login> (bookmark this page) or by visiting rennercpa.com and clicking on the Client Portal link in the upper right.

