

Scott Tax & Financial Services  
3 McNish Ct.  
Bluffton, SC 29909-4447

## **GUIDE TO SETTING UP AND USING YOUR CLIENT PORTAL**

Our NetClient Portal system is the safest way to send and receive documents from Scott Tax & Financial Services. It is simple to use and securely encrypted with 256-bit encryption, redundancy and password protection.

Once you have contacted us about preparing this year's tax return, we will add your email address to our NetClient register. You will then receive an automated email allowing you to register to access the NetClient system. As part of the registration process, you will create an individual login ID and a password.

Below we have tried to answer some login and password questions. However, if you should have any additional questions, please call Gerel at 614-325-6162 or email at [gerel@scotttaxes.com](mailto:gerel@scotttaxes.com)

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### LOGIN AND PASSWORD QUESTIONS

Browsers:

Please access the portal using Google Chrome, Microsoft Internet Explorer (9.0 or higher), Microsoft Edge or the latest version of Mozilla. **Do not use Safari.**

How do I log in?

Log into the portal at [www.netlinksolution.com](http://www.netlinksolution.com)  
Also, you can access the login link via our website at [www.scotttaxes.com](http://www.scotttaxes.com)

What is my login?

Your login is the primary email address that we have on file since this is the easiest to remember. At your first login, you will also create your unique password.

### SENDING DOCUMENTS

How do I send documents to Scott Tax?

Login to your portal and Click on "File Exchange" on the left side of the screen.

There will be two options: Source Documents and Tax Returns.

Click on Source Documents. Then click the upload icon on the toolbar along the top of the page. On the popup box that appears, click on "Add Files".

Once you have completed adding your documents, select "Start Upload".