

Client Portal Frequently Asked Questions

HOW DO I ACCESS THE CLIENT PORTAL?

Simply click on the link on our website to log into your portal. You may connect to your portal using any standard browser. We will create an account for you and provide detailed instructions on logging into the system.

WHY IS THIS BETTER THAN E-MAIL?

There are two main reasons: security and sending large files.

Our Client Portal allows any-size file to be uploaded; this is not the case with most e-mail clients. While many will allow files of around 5 MB in size, most e-mail systems will reject files that large. Some examples of large files include QuickBooks files or 300 page PDFs of tax returns and supporting documents. Another limitation of e-mail is that you must encrypt and password-protect each file before you send it - with the Client Portal you just save the file and let the portal take care of the encryption.

IS MY PERSONAL DATA SAFE?

It's amazing how many sensitive files are sent "in the clear" — unencrypted and open to theft by any hacker or cyber thief. Many people are not aware that all files sent by e-mail or FTP travel across the internet completely un-encrypted. Even if hackers do not intercept files, many companies distribute the same FTP password to all clients because of the difficulty and inconvenience of managing users with FTP. This creates a situation where one client is able to browse through other clients files simply by clicking into their folder.

Our Client Portal uses advanced 128-bit SSL encryption so you and our firm can exchange documentation with complete peace of mind.

>> Only Tracey S. Peters, CPA, LLC and you will have access to your folders and files!

HOW IS MY DATA STORED?

Our Client Portal data hosting facility is known in the industry as a Level 4 data facility. This means that the Data Center maintains the highest levels of security; it offers fully redundant storage with climate control, power backup, site security and more. In addition, data stored at the facility is backed up to both local redundant systems, as well as to offsite locations that meet the same high-level of requirements.

HOW LONG IS MY DATA STORED?

You have complete access to your data and may remove it from the portal at any time.

HOW DO I KNOW WHEN A FILE IS AVAILABLE?

Any time a new file is placed on your portal, you will receive an e-mail notification from the system. This e-mail will contain a hyperlink that will take you straight to the login page of the portal, where you may enter your e-mail address and password to access your documents.

HOW FAST DO MY FILES UPLOAD AND DOWNLOAD?

The time it takes to upload or download a file is dependent on two factors, the size of the file and the speed of your Internet connection.

ARE THERE ANY SYSTEM REQUIREMENTS FOR ME?

We do not require any special software to be installed on your computer, other than a current standard based web browser. We are optimized for use in Windows with version 7.0 (or later) of Internet Explorer and Firefox version 3.0 (or later).

Both browsers are available free from their developers:

www.microsoft.com

www.mozilla.com

Older browsers, and browsers such as Chrome and Safari, may not provide an optimal experience!