

Client Portal User Guide

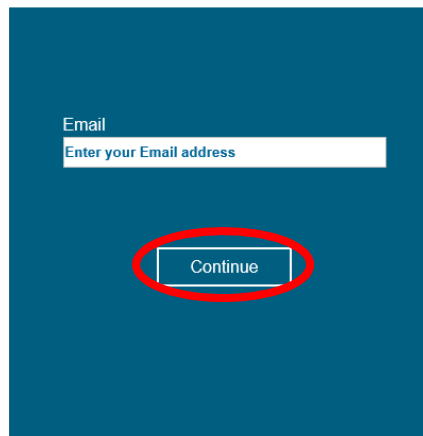
Step 1 – Log in to Client Portal navigating to: <https://clientportal.globetax.com/>

Type in your *E-mail* address.

Click

In the effort to enhance our users' security, we have incorporated a multi-layer authentication protocol in order to log into this site. Please enter your Email here and you will be prompted for your password on a subsequent page. Thank you

USER LOGIN



Email
Enter your Email address



ABOUT SSL CERTIFICATES

Step 2 – User Security Setup

You should have received an email containing a temporary password.

Enter the temporary password in the “Current Password” field and then enter your desired password in “New Password” and “Confirm Password” to setup your login information.

Click .

Note: Click the checkbox next to Show Passwords in plain text to display your password before submitting.



CHANGE PASSWORD

Passwords are Case Sensitive

Your password must contain 8 - 20 alphanumeric characters with at least one lower case letter, one upper case letter, one number, and one special character. Special characters list: \$@!%*&.

Email

Show Passwords in plain text

Current Password

New Password

Confirm Password

[Forgot Password?](#)

Three red arrows point from the right side of the form to the Current Password, New Password, and Confirm Password fields. A red circle highlights the Submit button.

Step 3 – User Security Setup

The image and image caption you choose will appear each time you log in to Client Portal. When you see the image and image caption, you will know that you are logging in to the official Client Portal site.

Select your computer type, public or personal.


Click when you are finished.

Note: You must have cookies enabled in order to register your computer. If you clear cookies, or have them disabled, you will be prompted to answer a challenge question when you log in.




















Set Up Login Image

Select one of the images from the image library to be your Login Image. Once you have selected your Login Image, on subsequent logins to the system your Login Image will be displayed on the login page. This personal Login Image enables you to validate the authenticity of our site.



Fruits ▼



Choose an image caption that is personal and meaningful to you.

Your Image Caption:

By registering the computer you are currently using, you allow our system to remember the computer. If you register this computer, you will not be asked the security questions the next time you login.

Select one of the following:

- This is a Personal Computer. Register it.
- This is a Public Computer. Do not Register it.

Step 4 – Confirm Information

This screen allows you to review the information you have entered.

Click if all of the information is correct.

If any of the data is incorrect, edit the field and then click on to update your information.

To change your password click You must enter your old password and your new desired password twice to confirm the change.

Click to return to the previous page and change your login image, caption, or security questions.

Then, click



Account Data Confirmation

JANE DOE

PARTICIPANT INFORMATION

* Denotes required field

Send Email to change company name to: ClientPortal@GlobeTax.com

Company/GlobeTax ID:

First Name: * Last Name: *

Address: *

Address(cont):

Address(cont):

Address(cont):

City: * State/Province: ▼

Zip/Post Code: * Country: ▼ *

Phone: *

Ext: Password is valid for 90 days.

Step 5 – View Reports

To view your reports, choose next to the desired report. The report will then be downloaded to your computer and you can choose to either open or save the file.

Some reports may take a few minutes to download based on the size of the file and your internet connection.



REPORT REVIEW

JANE DOE

Waiting for your selection...

Large reports may take in excess of 1 minute to process. There may also be a slight delay from 'Done' Processing to Report Download

REPORTS Format:

XLS XLSX

Microsoft Office 2007 or later is required to view and download XLSX files.

If your computer uses an older version of Microsoft Office, select XLS format (above) to view your report.

REPORT NAME	DESCRIPTION	REF DATE	
QUARTER 2 , 2016	Item Status	Jun 29 2016 2:02PM	<input type="button" value="Select"/>