



PORTAL ACCESS INSTRUCTIONS

The AGA Client Portal is hosted by a company by the name of Sharefile. They are a secure and encrypted remote portal hosting service. Below you will find instructions on how to create a login for your portal and access your tax returns. If you need to transmit data to us securely you can use your portal for this as well or click on the secure link in our email signatures for quick access to upload services.

You may log into your portal at any time via our website at www.agaaccounting.com and clicking on the Client Portal tab or by visiting www.sharefile.com directly. Instructions on how to use the portal can be found on our website under the Client Portal tab, labeled Guide: Using The Portal.

STEP 1: When we complete your tax return you will receive an email from mail@sf-notifications.com letting you know that we have uploaded your return. If we do not have your email on file, please call the office to initiate the process. Or if you want to access the portal before your return is complete you can call the office and request a link be sent to you. This email from Sharefile will let you know that a folder has been shared with you and give you a link to activate your account and view the folder. **CLICK ON THIS LINK.**

STEP 2: The next screen will ask you to verify your First Name, Last Name and Company if you have one.

STEP 3: You will be asked to create a password. If you ever forget your password there is a forgot password link on the Client Portal tab of our website.

STEP 4: You will be brought to the folder that is shared with you and inside this folder will be a copy of your tax return.

After this initial setup you will be able to access the portal using your email and password via www.sharefile.com or the Client Portal tab on our website.