CLIENT PORTAL GUIDE

PLUGGED IN CPA

What is a portal?
A document storage site on the internet for files to be stored and retrieved securely.

When would you use it?
Anytime you want to send documents to us or anytime you want to see the documents we send you.

Do i have to get a new portal everytime I want to send documents?
No! You can continue to use the same portal and the same password.

How do I get setup?
Any of our staff would be happy to help you get started.

Contact Us
Phone : 506-455-5397

Website : pluggedincpa.com

E-mail : info@pluggedincpa.com

STEP – 1

You will be prompted to change your password upon entering the portal for the first time. Your current username and password can be found within the email that we sent to you notifying you that your portal account was ready.
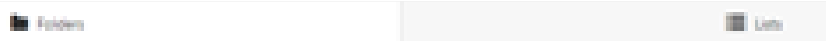
STEP – 2

Upload a document

Click on the relevant folder and click upload. Find your document and click upload. We will be automatically updated you added a document so no need to reach out.

Answer a PBC list

At the top of the portal instead of folder click list.

Click the relevant list item and click upload. Find your document and click upload. We will be automatically updated you added a document so no need to reach out.

Retrieve a document

If you got an email saying, we uploaded a document you can go to the portal click download.

You will now be able to find your year end financial statements, monthly bookkeeping packages and many other documents stored here.

Please do not hesitate to contact us if you need any help or have any questions!