



# **Foley Kalseim & Company, LTD. Secure Client Portal User Guide**

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# Icon Legend



**Keys**

**Quick reference to the key aspects of a particular function**



**Tip**

**Best practice tips and shortcuts**



**Notes**

**Informational notes about functions**



**Warning**

**Important warnings about a function**

## About the Foley Kalseim & Company, LTD. Secure Client Portal

At Foley Kalseim & Company Ltd. we take the privacy and security of your information seriously. As a valued client, you get a secure password-protected portal to store and access your important financial documents from anywhere at any time.

All documents are made available to each client on the Secure Client Portal. Clients may upload files, download files, or permanently delete files as the client sees fit.

# Getting Started

## Portal Login

- Launch your internet browser and go to <https://secure.netlinksolution.com/nextgen/?firm=59637>



## Foley Kalseim

12415 - 55th Street North, Lake Elmo, MN 55042  
(phone) 651-430-3635 (fax) 651-430-9326

Please log in.

[Forgot password?](#)



## Login Tips

- Refer to the email we send you for your portal login information.
- The Login ID (email address) is not case sensitive; the temporary password provided via email is case sensitive



You will be required to change your password upon first login and answer a few security questions. Your security questions can help you access your portal if you ever forget your password.



Your new password may be from 8 to 32 characters in length, must contain at least one alpha character, one numeric character, and one special character (e.g. !, @, #, etc.). The password is case sensitive.

- Your password may be reset at any time by clicking “Forgot password?”

# Adding Files to Portal

## Steps to Add Files to Portal

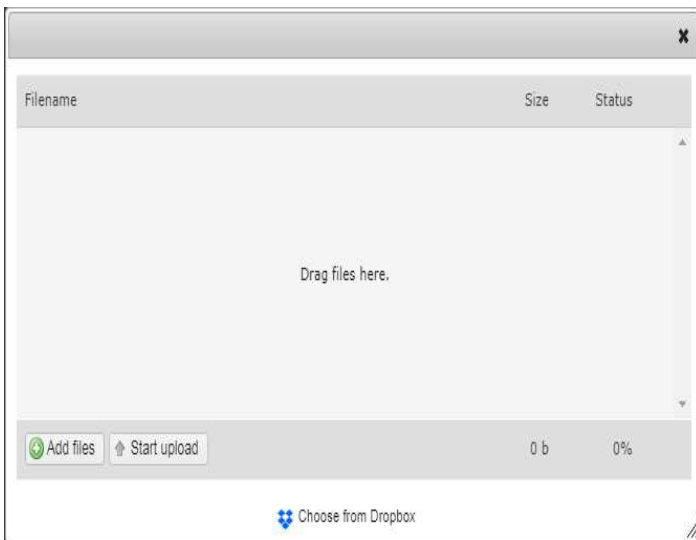
On the Portal Home page:

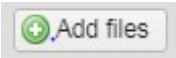
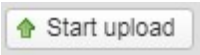
- Select a portal (only for those users that have access to multiple portals)
- Select the file location (folder)



The Actionable Items folder is a temporary folder and documents will be deleted after two weeks

- Once you have chosen the folder you would like to upload file(s) to, click



- You may either select  or drag and drop the file(s) you want into the center box
- After all file(s) are selected or dragged in, click  to upload the file(s) to Portal

- After the upload is complete, we will automatically be notified along with a list of all the files you sent.

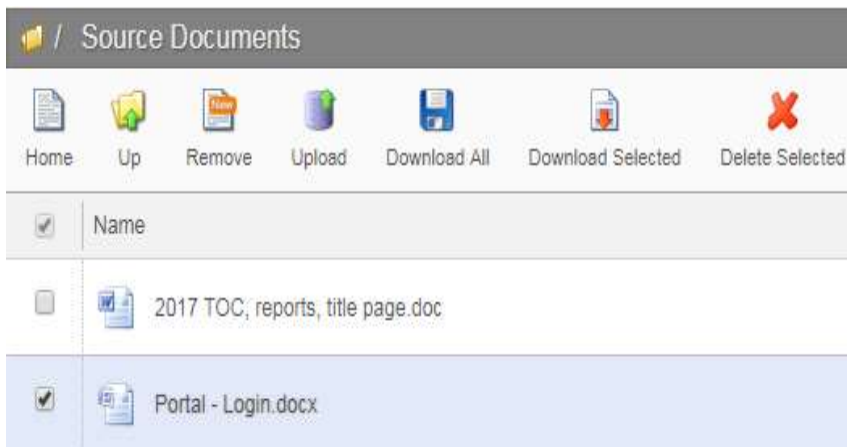
# Download/Delete files from Portal

## Folders



Folders are used to organize files on the portal. Simply choose a folder to view files.

## Files



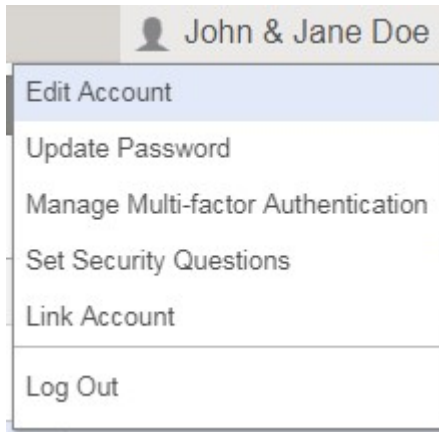
Click the box to the left of the file name, this gives you the option to download or delete the selected file(s). You may also select Download All and all files in the folder will be downloaded.



You CANNOT delete files uploaded by FOLEY KALSEIM & COMPANY LTD. You may delete files that you upload.

## Miscellaneous Portal Functions

### *Changing Passwords & Logging Out*



At the top right-hand corner of the page, click on your name to view user options. From this menu you can change your password or Log Out of the portal.

### ***Effective November 18, 2023 – required changes to NetClient CS portal***

Follow the instructions below, which will improve your portal security:

- Create a new username and password. To do this, you'll need your current NetClient CS login ID and password. If you've saved these details to your browser, please memorialize them. If you've forgotten your login ID, please contact our firm.
- Click on the following link that will take you to the Thomson Reuters page to create an account. <https://account.thomsonreuters.com/en-us/profile/about>
- The sign-in page will look different but will function the same way.
- You'll need to enable two-factor authentication. There are several options available to verify your identity when you log in. We recommend using the Auth0 Guardian mobile app, which is free on the Apple App Store for iOS and Google Play Store for Android.