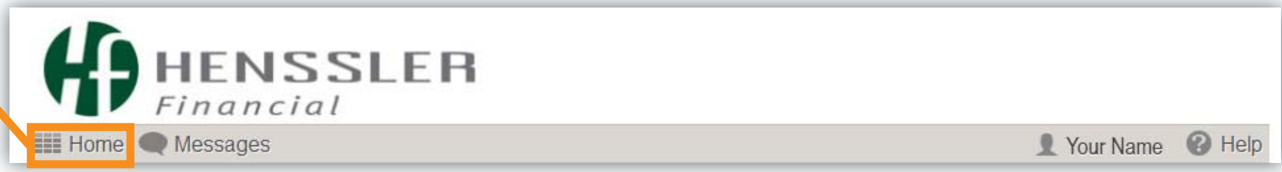
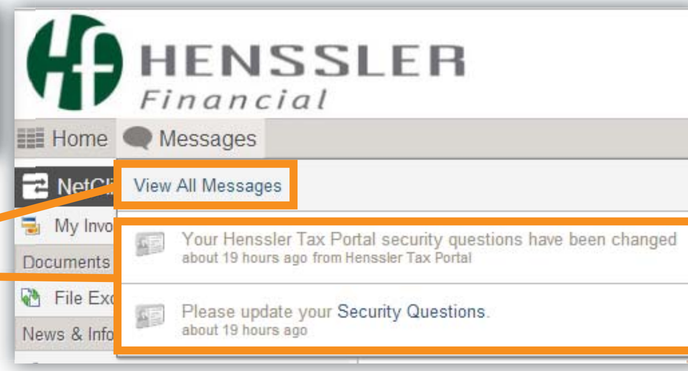
Top Menu

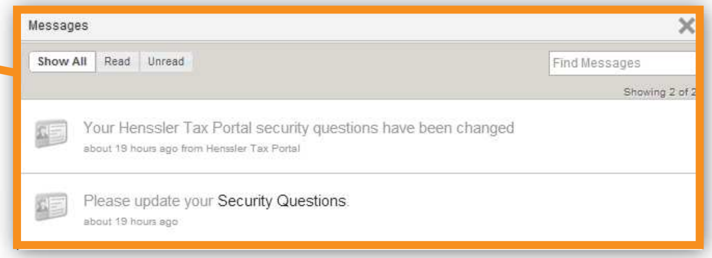
1. Home
Clicking this link will take you to your Tax Portal home page.



2. Messages
Messages are not communications from your Tax Consultant, rather they are system-generated notifications about your portal.

- When you have new messages, a number will indicate how many.
- Clicking Messages in the top menu will display your most recent messages.
- Clicking “View All Messages” will open your Message center. Not only will you be able to view all messages, you will also be able to search, sort and delete messages.

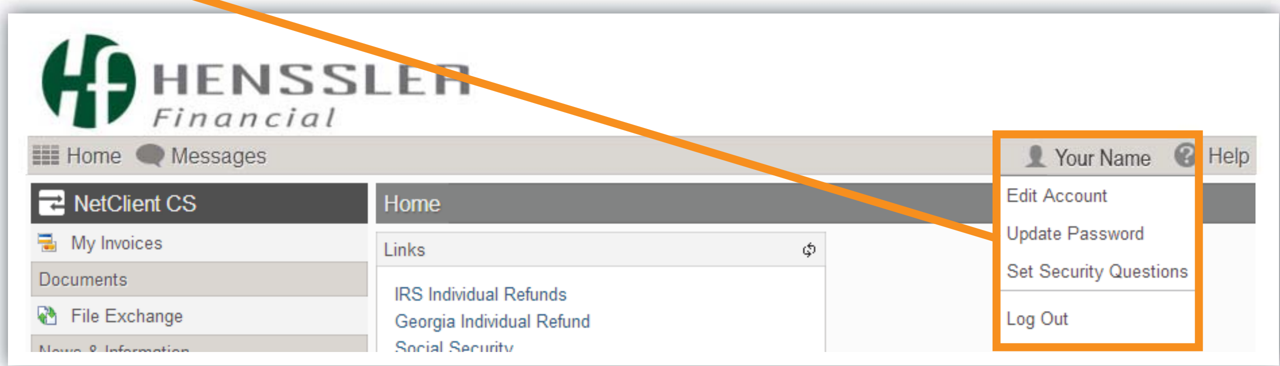




3. Your Name (Account Settings)
Clicking your name will display options to change account settings. It will also provide the option to log out.

4. Help
Clicking help will provide quick-access to system tutorials. As a reminder, you can always email or call us for assistance:

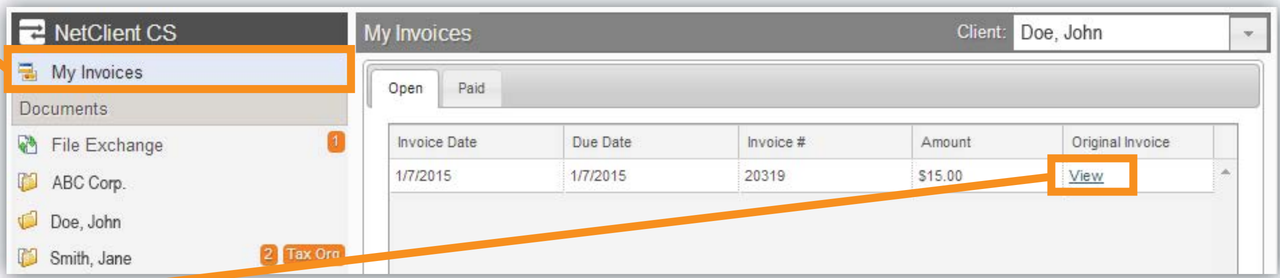
- 678-813-5294
- taxportalassistance@henssler.com.



My Invoices

Invoices posted to this section can be viewed online, printed or downloaded as pdfs.

Note: You cannot pay your invoices online.

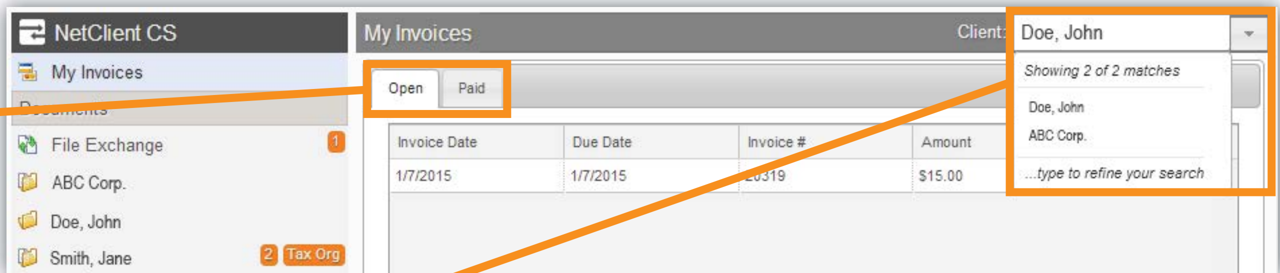


Viewing Invoices

Click the "View" link next to the invoice you want to open. The invoice will open as a PDF document in a new window.

Additionally, you can view invoices by:

- **Categories:** Invoices are sorted by Open and Paid. Open invoices will be listed by default. To view Paid invoices, click the Paid tab.



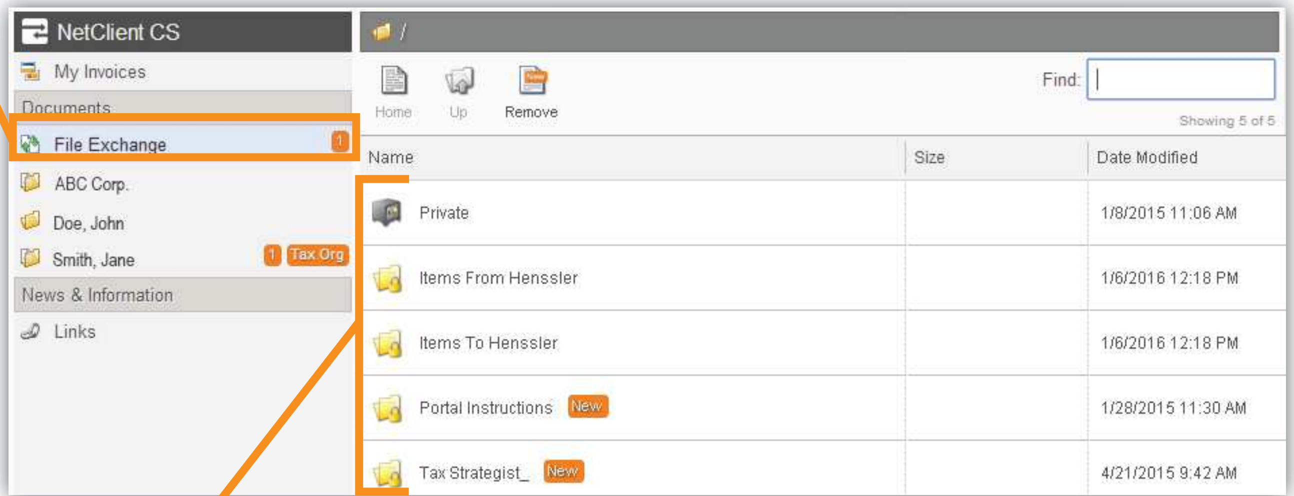
- **Client:** If you have more than one billable account with the Tax & Accounting Division, you can view invoices for either account. Simply click the downward arrow and select a name in the list. For example, if you owned a business that was a also a client, you would have two options—invoices for you as an individual and invoices for your business.

Printing or Saving Invoices

Once you have an invoice open (preceding instructions), use your browser's built-in functions to print or save the invoice.

File Exchange

The File Exchange is where you can upload and share files with your Tax Consultant, as well as view items posted to your Tax Portal.



Root Directories

The File Exchange will come pre-built with directories on the root-level. Clicking on the row will list the documents in that directory.

- **Private:** Store personal documents your Tax Consultant doesn't need to access.

Note: While your Tax Consultant can view documents stored here, they will not be notified when documents are uploaded.

- **Individual Tax Strategist and/or Business Tax Strategist:** Our monthly newsletter of tax topics will be posted to the applicable directory. Only business accounts will have both.

- **Items from Henssler:** Contains documents your Tax Consultant posts to your portal.

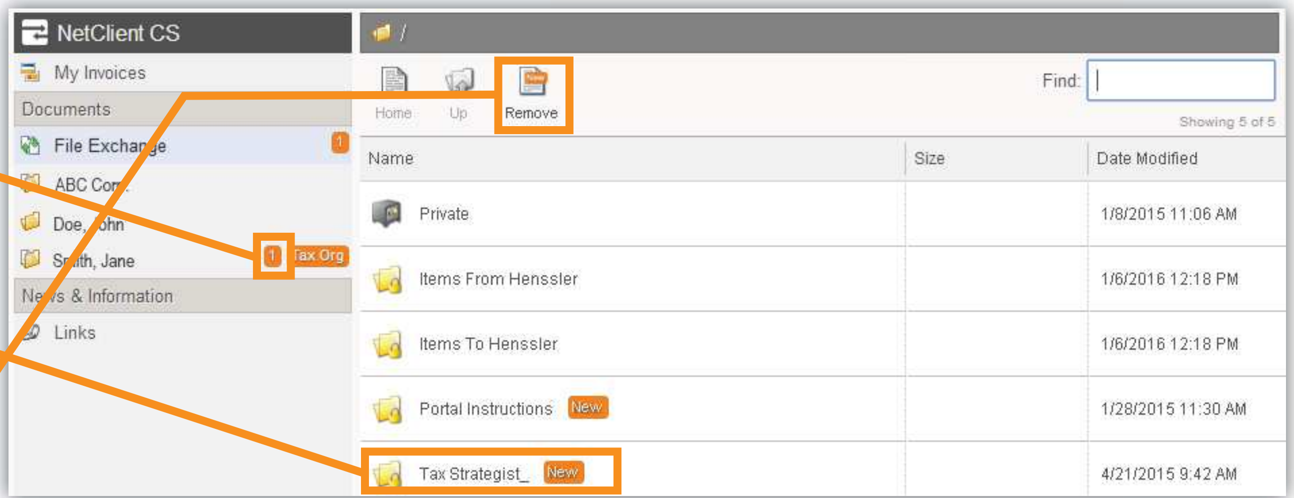
- **Items to Henssler:** Upload items to your Tax Consultant to this folder.

File Exchange

New Document Notification

When a new document is added to your portal, a number will appear in the side menu.

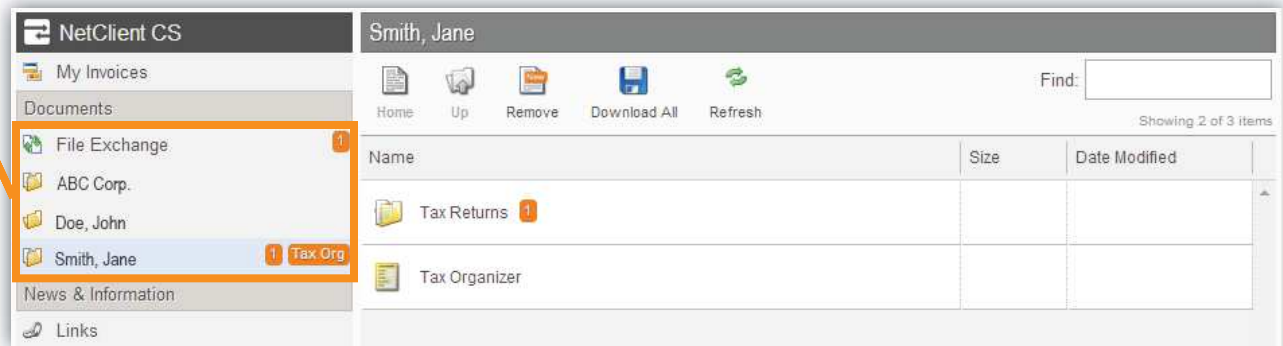
- When you click into that area, new items can be easily identified by the orange “New” flag next to them.
- You can remove “New” flags from your documents by clicking the remove button.



Account-Specific Files

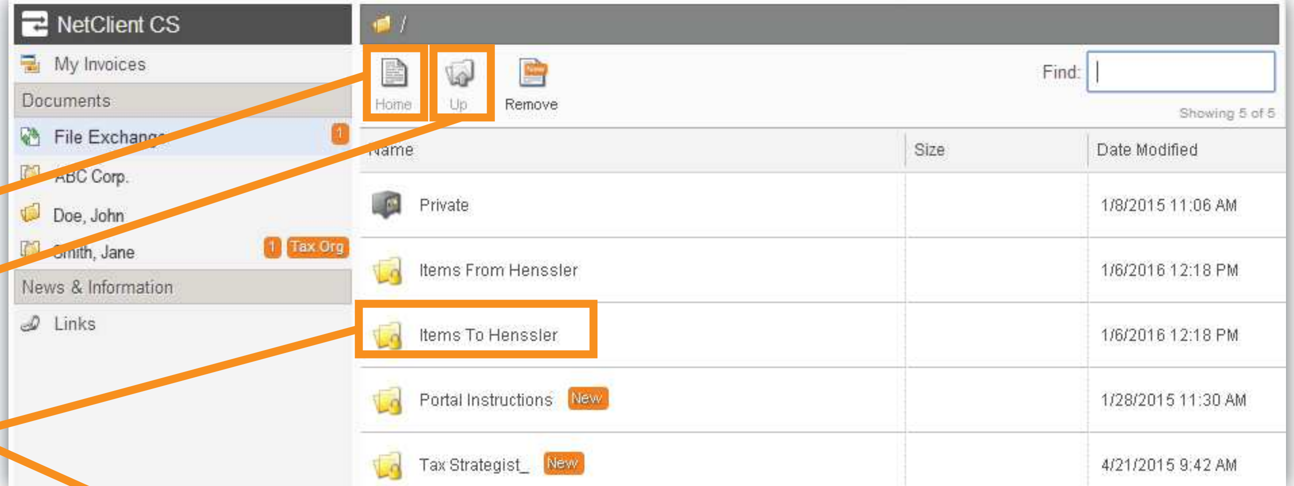
If you have more than one billable account, files for those accounts will be stored under that account. Accounts are listed in the side menu.

- To access files for a specific account, click the name in the side menu.
- That account’s files will be listed on the right side of the screen.



Note: In general, items that apply to all accounts will be located on the File Exchange root. Items that apply to a specific account, will be added under that account. For example, a Tax Strategist (which applies to all accounts) would be posted on the File Exchange root directory, while tax returns for a business (apply only to the business) would be posted under the business’s name in the side menu.

File Exchange

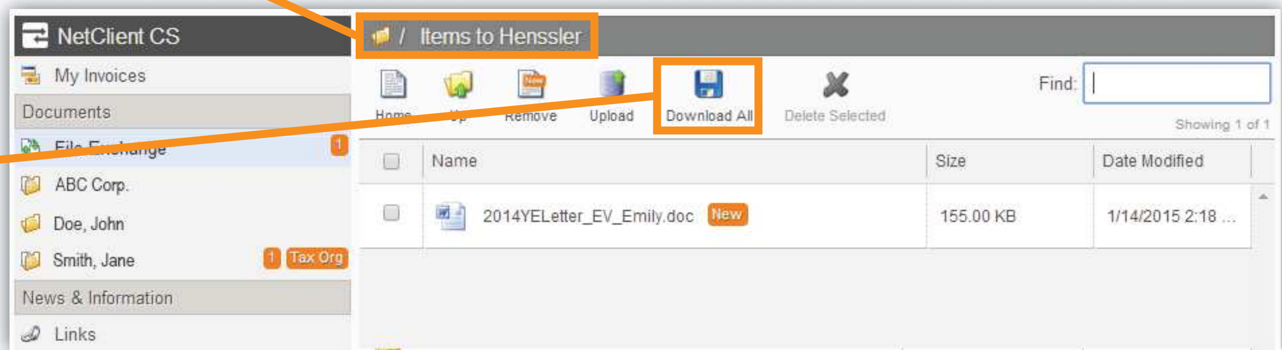


Navigating the File Exchange

- Clicking on the row of any directory will display that directory's contents.
- Clicking the Home button will take you to that directory's root-level.
- Clicking the Up button will take you one level up in the directory.

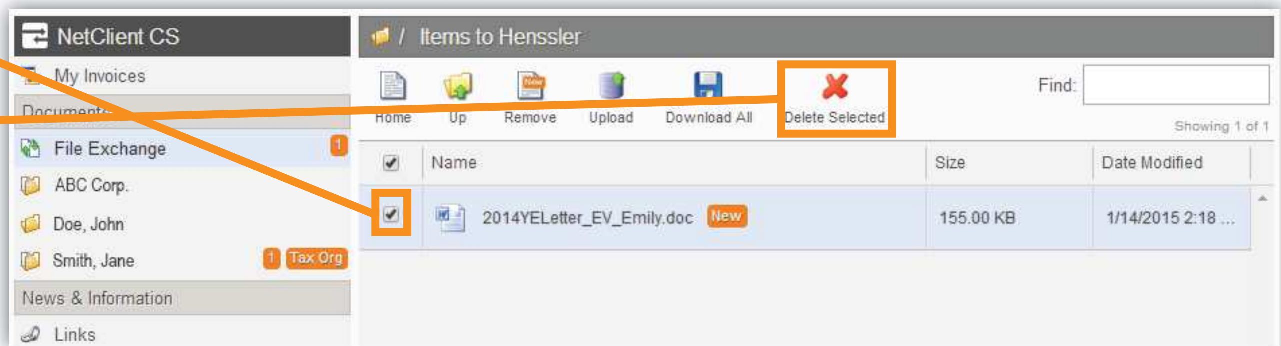
Directory-Specific Actions

The below actions are not available at the root-level of the File Exchange. You must be in a directory to do the following:



Downloading Files

- If you want to download all the files in a specific directory, click the Download All button. Your file will download as a zipped file containing the same folder structure as your File Exchange.
- If you want to download a specific file, click on the file to open it in your browser. Then use your browser's built-in functions to save the file.



Deleting Files

- Check the box next to the file name of the file you wish to delete.
- Click the Delete Selected button.

Note: Some files, such as the Tax Strategist Newsletter and your Tax Returns, cannot be deleted by you. Additionally, Henssler Staff has the ability to delete account-specific files in your portal.