Miller Financial Services Online Portals



The Complete Step-by-Step Guide

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How to access your portal-with activation link

- 1. Activation links are sent to the email on file. If your email has changed, please contact the office.
- 2. Copy the username provided in the email and click on the link. This will direct you to your portal login.
- 3. Paste the given username in its corresponding spot and follow the prompts to enter the last 4 of your SSN.
- 4. Create password. It is recommended that you save your username and password. They will remain the same each tax year.

How to access your portal-without activation link

1. Go to millerfinancialservices.com and click on the Client Portals tab then select "Click Here" under Access to Client Portal.

Forgot username/password

- 1. Go to millerfinancialservices.com and click on the Client Portals tab then select "Click Here" under Access to Client Portal.
- 2. On the login screen click on the "Forgot Username/Password" and follow the prompts to enter email information.

Updating email/password

- 1. While in your portal, click on your name in the upper right corner of the page, and select Account.
- 2. Under My Account click on the 🗹 symbol to update your email and password.

How to download your documents

- 1. Login with your username and password.
- 2. On the left side of the screen click on the **Files** tab.
- 3. Under the **From Preparer** section, locate the file to be downloaded and click the download icon 🛃.
- 4. You can access your downloads in your computer file system in the folder named "downloads".

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How to upload your documents

- 1. On the left side of the screen click on the **Files** tab.

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How to update your profile

- 1. On the left side of the screen click on the Profile tab.
- 2. Fill in your information in the boxes provided and click on the Information is complete box.
- 3. To edit your information uncheck the Information is complete box by clicking on the check mark.

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How to talk to your tax preparer online

- 1. While in your portal, click on the **Messenger** tab on the left side of your screen.
- 2. Type your response in the text field and click the Send button.

Please note that the messenger system does not produce automatic replies. We work very hard to respond as soon as possible.

MILLER FINANCIAL SERVICES

MILLER MINICIAL SERVICES TestClient and I would love for you to prepare my taxes Service Profile CheckList Questionnaire Meisenger Sign Foems Payment

How to sign e-signature forms

- 1. On the left side of the screen click on the **Sign Forms** tab.
- 2. Click on the signature documents located under Documents Available to Sign.
- 3. Once the e-file forms open click on the yellow box in the signature space.
- After clicking on the yellow box, identity authentication questions will be provided for security purposes. Follow the prompts to answer these questions.
- 5. After verifying your identity a box will pop up to capture your signature. Use your mouse or stylus to draw your signature, then click the Save button.



Your usemame is: COFFEEBEANS

Document Name: 2019 Signature Documents (BEANS COFFEE and COCDA)

To review and Sign the document, follow the link below:

Max.ISmiR/DEA.SecureEiteExp.com/connect/Risignformail/ul

If clicking the link doesn't work, you can copy and paste it into your browser's address bar.

Important Instructions

Enter your scientaine and password and click the Login botton,
 Click the Sign Forms tab on the left.
 The documents will appear in the list of documents available for signing.
 Hyou have any questions, please contact us,
 John Smith, CPA
 123 Main Street, Franklin, NC 20734

6. For multiple signatures, follow steps 1-5 in each box highlighted for signature. You can use the arrows located on the upper left of the screen to move between signature pages.

7. Once all signature boxes are filled click on the Submit Signatures box on the bottom right of the screen.

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How to pay online

- 1. On the left side of the screen click on the **Payment** tab.
- Locate the bill to be paid and under the status column and click the green button.
- 3. Enter in the payment information associated with the card you are using. Note: It is important to enter the information that matches what your card company has on file. If this information does not match it will result in a failed transaction.
- 4. Enter in your credit card information and click Submit Payment.
- 5. A box will pop up asking to verify that you would like to submit payment, click Submit.
- 6. The following box will inform you if your payment is processed, click Ok.
- 7. When the transaction is complete the status column will indicate "Paid".

Note: Please allow up to 1 business day for tax return and signature document forms to be uploaded upon payment submission.

Data Sent Am	iount.	Oats Paid	Memo	Status	
6/11/20, 12:50 PM \$25	50.00	6/11/20, 12:58 7	PM. Thanks for your buri	nt Faid	
8/15/20, 1:45 PM \$15	10.00	6/15/20, 1.11 (9	M Thanks for your busi	et Dag	
P	ayment				
9	Use information to	om profile		Fnav	
3	Marrier	ANUES	HURIND II	chay	
1	Email:	4111@diakesoftwi	we.com		
	Address	235 East Palmer St	teen	Would you like to submit this payme	nt?
3	Citys	Franklin			
3	State	North Carolina			Submit
	Zipe	28734			
	redit Card	Informatio	n	in from profile	
	Amount Due:	10.00			
23	CC Number:			Payment	
	er		-		•
1	Expiration				
3	CVV			This transaction has been approved.	
		Submit Payment			



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	Status	10 S	6d	Date F	Amount	Date Sent
	Twist	for your business! Pair	UZSE IN T	6/11/20	\$290.00	N11/20, 12:50 PM
	haid	For your business! Rain	ITTIM T	6/15/20	\$150.00	6/15/30, 1:05 PM