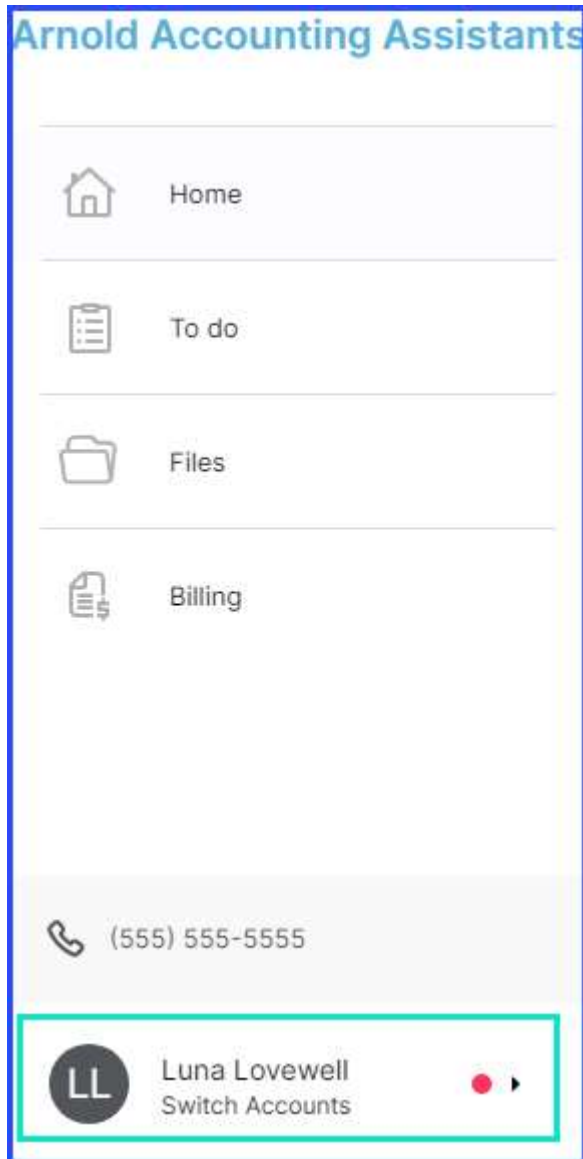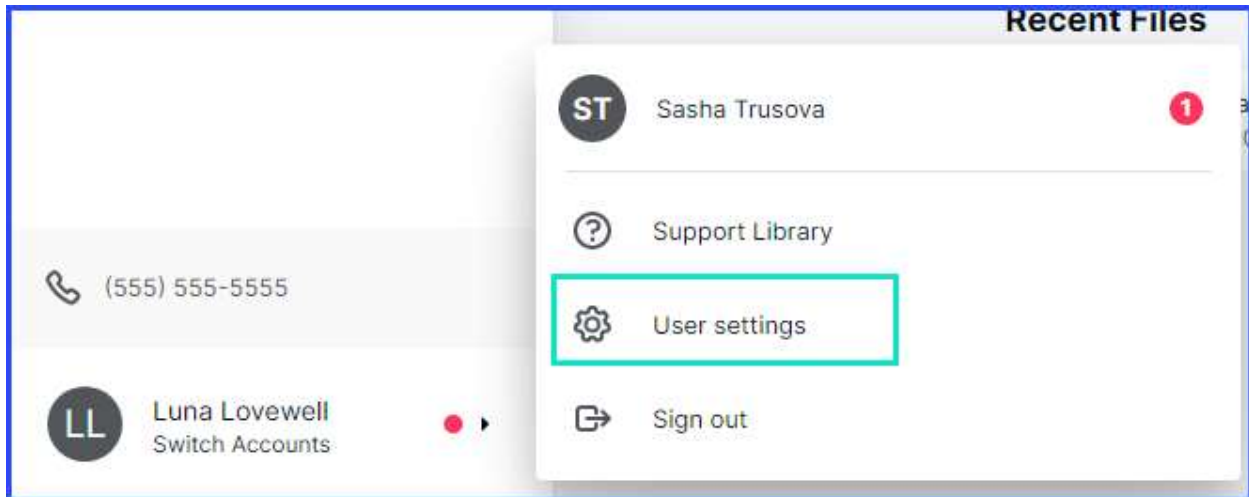# Client Portal Settings

You can update your contact information, time zone, and password in your Client Portal account settings. To get started, log in to your Client Portal account.

1. Click on your *Profile name* in the bottom left.

2. Click *User settings* on the pop-out menu.

3. Update the information in any of the provided fields.

Available fields to change include **First Name, Last Name, Email, Phone and Ext., Time Zone,** and **Password.**

Please Note: The name displayed on your profile must also be changed by your accountant. If you need to have your name changed in the Client Portal, please reach out to your accountant.

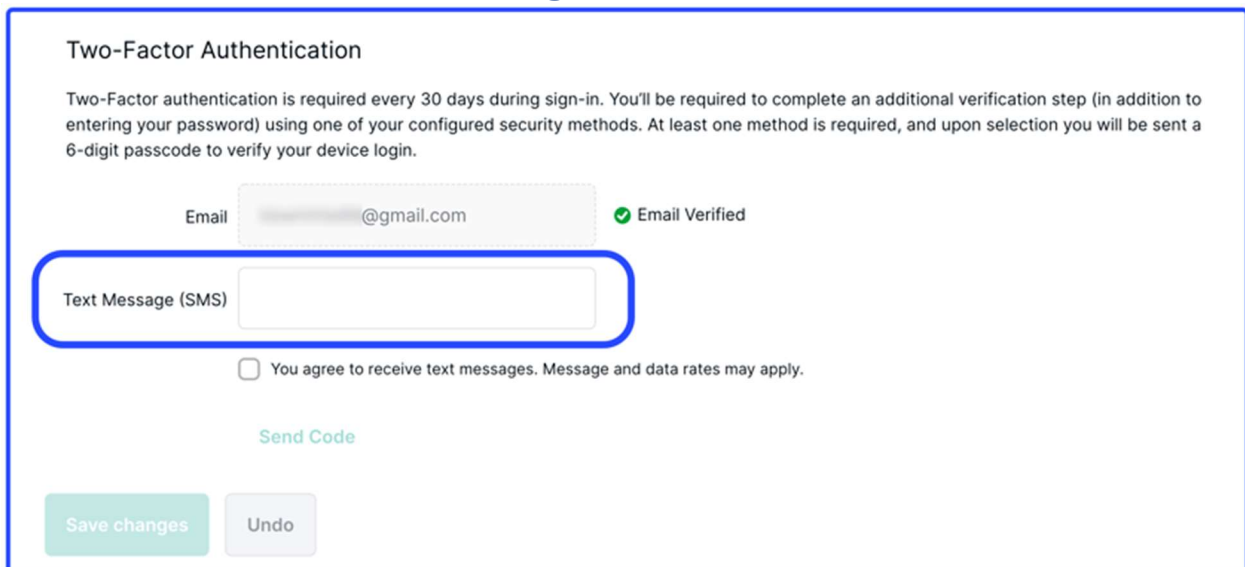## 4. Click *Save Changes*.

Two-Factor Authentication Settings

This section details how to enter and manage security methods for two-factor authentication (2FA).

When you sign in to the Client Portal, you'll be asked to enter a six-digit code to authenticate your account. By default, the code is sent to your account email. After you enter the code, you'll access the Client Portal.

The steps below guide you on how to enable text messages (SMS) as another method to receive codes.

1. To receive codes on your mobile device, enter a phone number in the Text Message (SMS) field.
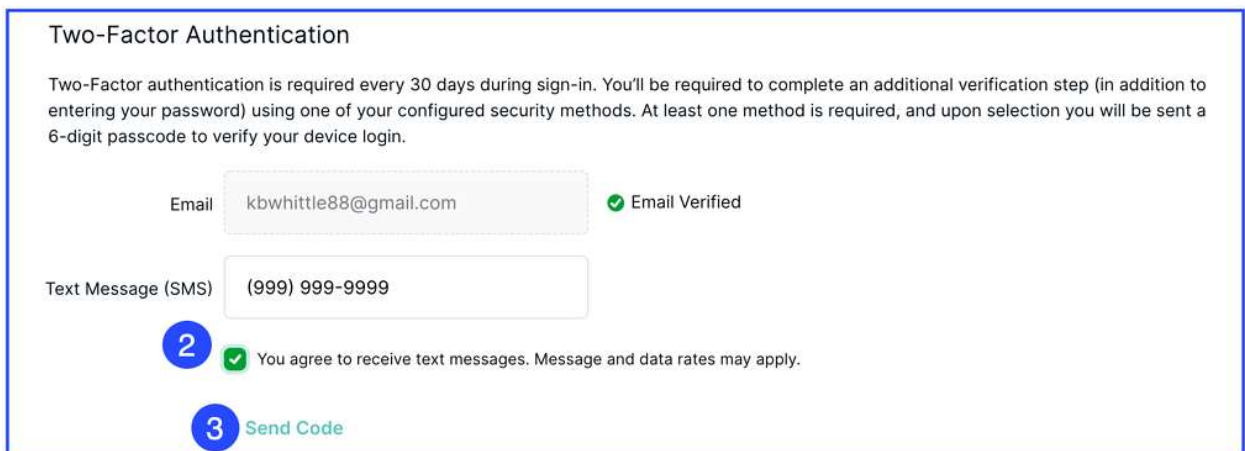
2. Check the box to agree to receive text messages.
3. Press Send Code to receive a verification code.

The requested code looks like this:
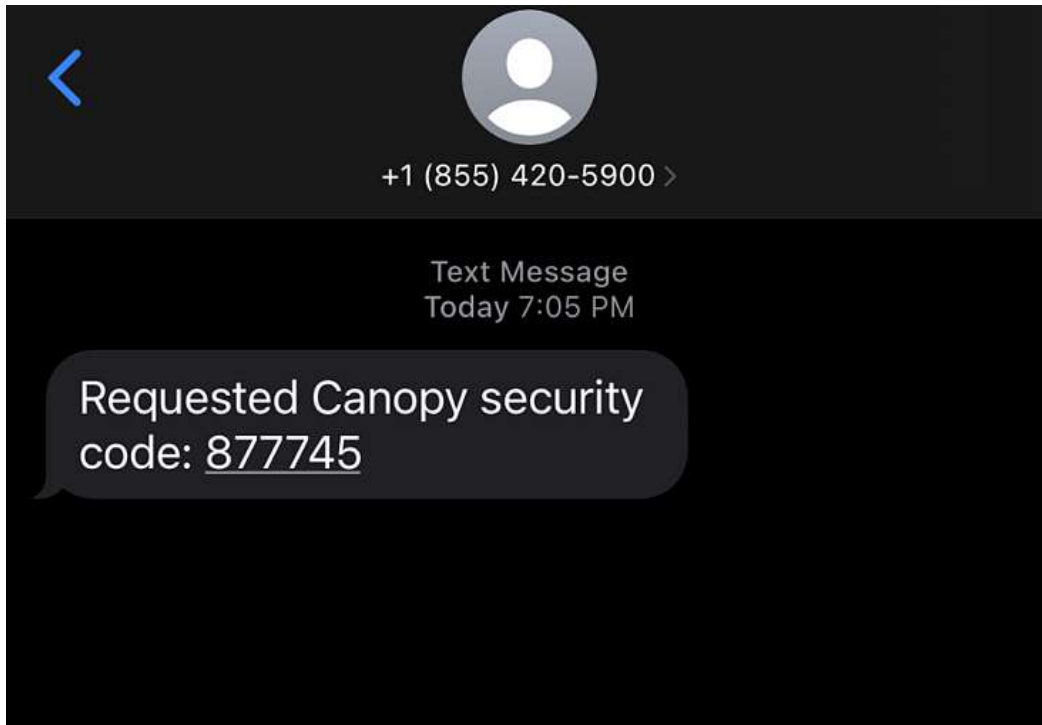
4. Enter the code in the Client Portal and press Verify SMS.

Once verified, you can use your email or phone number to receive codes to authenticate access to your client portal.