



# User Guide

## Connection Help

This document guides you through the different steps to connect to clientAccess.

To go directly to the page of the guide that interests you, click on the chapter titles below.

[Creating or Converting an Account](#)

[Connecting to Your clientAccess](#)

[I Forgot my Password \(Microsoft account\)](#)

[Editing two-factor Authentication](#)





# Creating or Converting an Account

If you are a new clientAccess user, you must create your account.

If you are already a clientAccess user, you must convert your account to the new authentication.

## 1 Connection page

### If you are a new clientAccess user:

Start the process to create an account by clicking on *Connect to clientAccess* and [go to Step 2](#).

### If you already have a clientAccess account:

A- Click on *Convert my account* to open the conversion area. Enter your user ID and password and click on *Start the conversion*.

Raymond Chabot  
Grant Thornton

Connect to clientAccess

Connect to clientAccess

Connection help?

Convert my account

yours@example.com

your password

Forgot your password?

START THE CONVERSION >



**B-** Read the instructions carefully before starting, then click on *Start update*.

## Just a few more steps to sign in to your new clientAccess!

In order to serve you better, clientAccess is transitioning towards a more powerful Microsoft technological platform that will allow you to add new features.

### **Update your authentication in only a few minutes!**

1. Click on the "Start Update" button.
  - If you have a Microsoft account associated with your email address, you may authenticate using this account.
  - Otherwise, you can authenticate using a one-time code sent to your inbox.
2. Configure the two-factor authentication (secure your connection via a phone number).
3. Accept the terms and conditions, and benefit fully from the advantages of your clientAccess.

**Start Update**

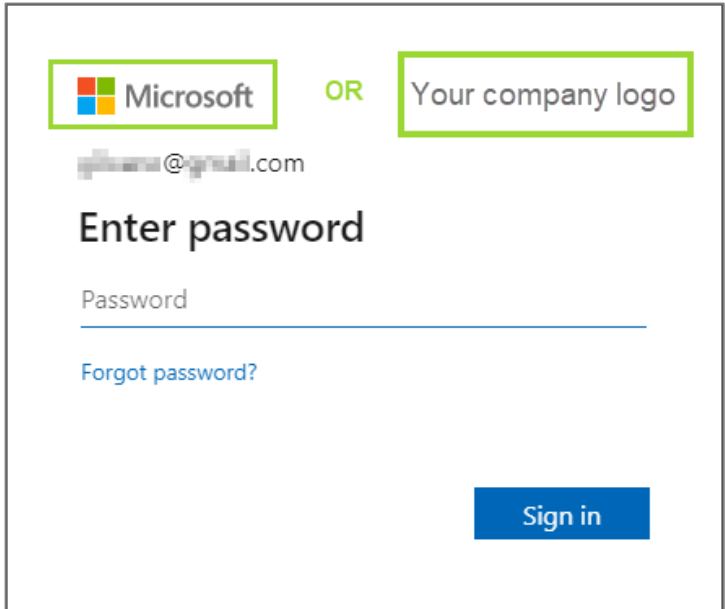
Please read the [task aid](#) if you need more information.

Thank you for trusting Raymond Chabot Grant Thornton. If you have any questions regarding your account, please contact your professional or at [1 844 5espace \(1 844 537-7223\)](tel:18445espace).



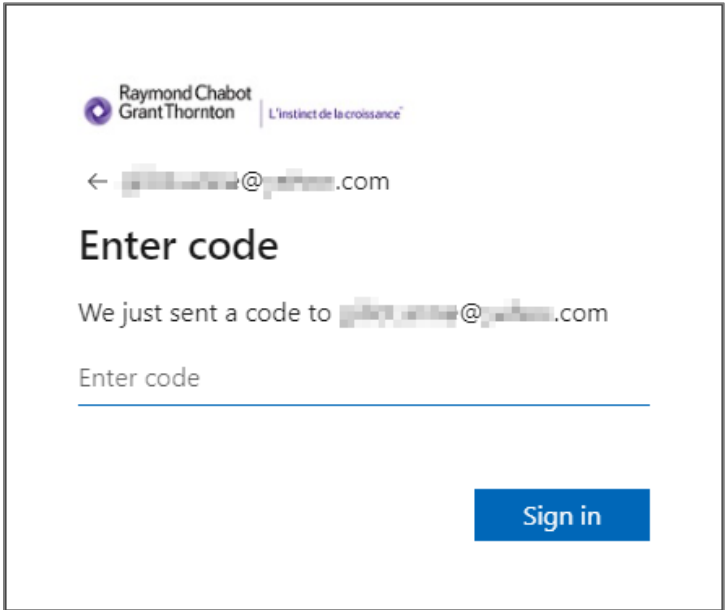
**2** Sign in

**If your email address is linked to a Microsoft account**, this page will be displayed. Enter your Microsoft account password, then click on *Sign in*.



Microsoft OR Your company logo  
[email address]@gmail.com  
Enter password  
Password  
[Forgot password?](#)  
Sign in

**If your email address is not linked to a Microsoft account**, you have to authenticate by entering the code sent to your email address. Then click on *Sign in*.



Raymond Chabot Grant Thornton | L'instinct de la croissance  
← [email address]@domain.com  
Enter code  
We just sent a code to [email address]@domain.com  
Enter code  
Sign in

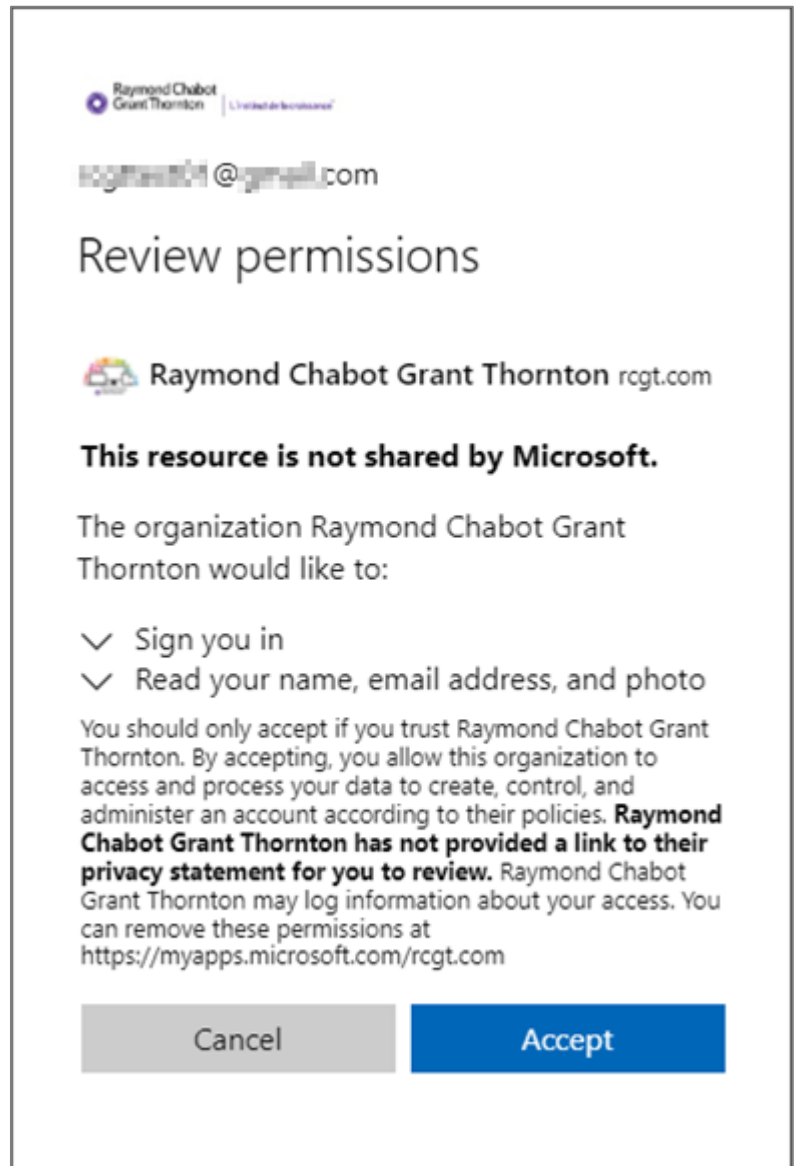
Note: In some specific cases, this step will be skipped.



3

## Accept permissions


By accepting, you are authorizing Raymond Chabot Grant Thornton to use your email account to create a clientAccess account.



Raymond Chabot Grant Thornton | LinkedIn

rcgthornton@gmail.com

### Review permissions

 Raymond Chabot Grant Thornton rcgt.com

**This resource is not shared by Microsoft.**

The organization Raymond Chabot Grant Thornton would like to:

- ✓ Sign you in
- ✓ Read your name, email address, and photo

You should only accept if you trust Raymond Chabot Grant Thornton. By accepting, you allow this organization to access and process your data to create, control, and administer an account according to their policies. **Raymond Chabot Grant Thornton has not provided a link to their privacy statement for you to review.** Raymond Chabot Grant Thornton may log information about your access. You can remove these permissions at <https://myapps.microsoft.com/rcgt.com>

Cancel Accept



# 4

## Set two-factor authentication parameters

Whenever you connect to clientAccess, two-factor authentication will confirm your identity by sending a code by text message or calling your phone.

Indicate your preference by entering the telephone number and selecting the method:

- Send a code by text message (cell phone only)
- Call me (cell phone or land line)

Then click on *Next*.

Microsoft

### Additional security verification

Secure your account by adding phone verification to your password. [View video to know how to secure your account](#)

**Step 1: How should we contact you?**

Authentication phone

Select your country or region

Method

Send me a code by text message

Call me

[Next](#)

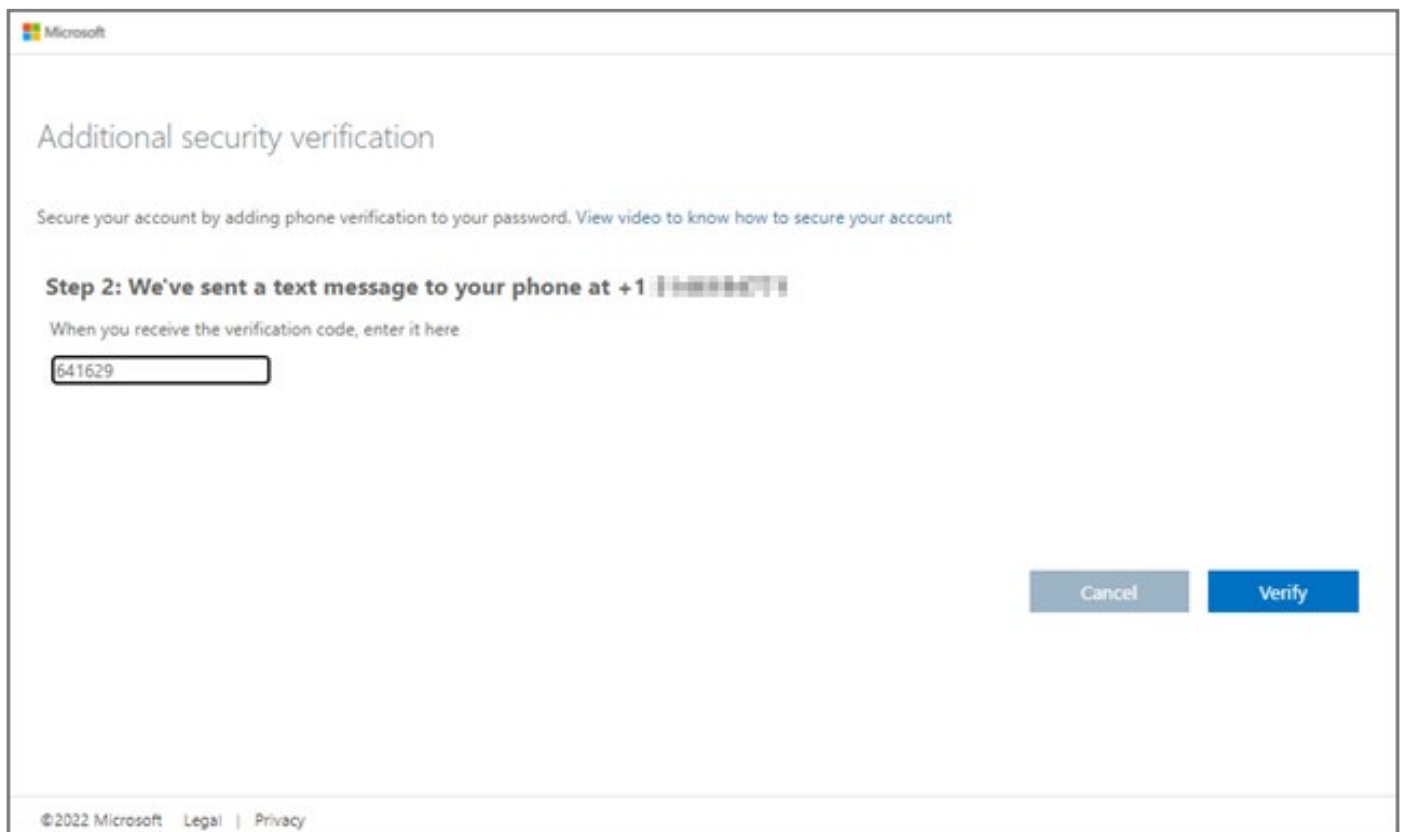
Your phone numbers will only be used for account security. Standard telephone and SMS charges will apply.

©2022 Microsoft Legal | Privacy



To validate the method you have chosen, you will receive a code by text message or a call on the phone you indicated in the previous step, according to your settings.

- If you chose the text message code, enter the code you received on the screen and click on *Verify*.
- If you chose the phone call, simply answer the call to complete the two-factor authentication setup.



Microsoft

### Additional security verification

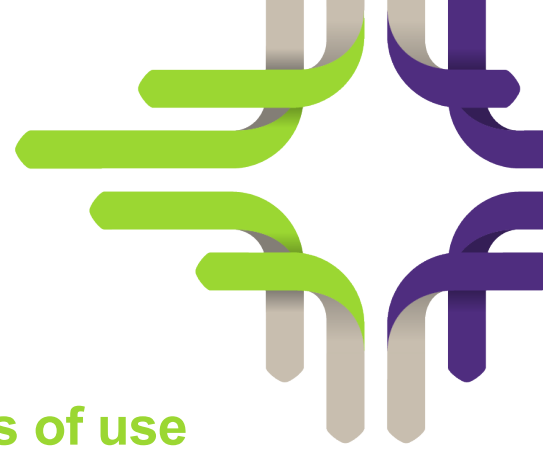
Secure your account by adding phone verification to your password. [View video to know how to secure your account](#)

**Step 2: We've sent a text message to your phone at +1 [REDACTED]**

When you receive the verification code, enter it here

[Cancel](#) [Verify](#)

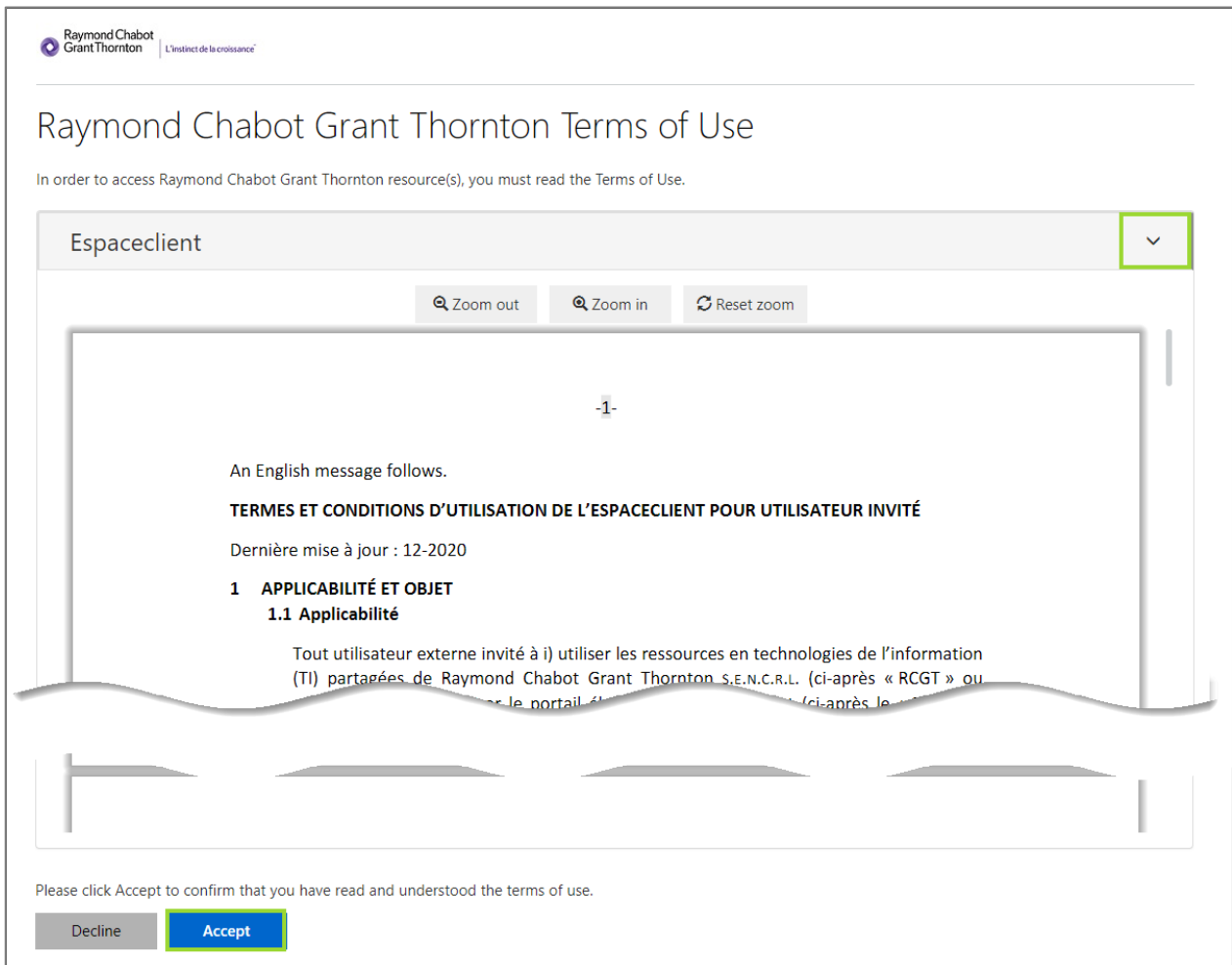
© 2022 Microsoft [Legal](#) | [Privacy](#)



5

## Accept the terms and conditions of use

To accept the terms and conditions of use, display them by clicking on the arrow.  
Then click on the *Accept* button at the bottom of the screen.



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### Raymond Chabot Grant Thornton Terms of Use

In order to access Raymond Chabot Grant Thornton resource(s), you must read the Terms of Use.

Espaceclient

Zoom out Zoom in Reset zoom

-1-

An English message follows.

**TERMES ET CONDITIONS D'UTILISATION DE L'ESPACECLIENT POUR UTILISATEUR INVITÉ**

Dernière mise à jour : 12-2020

**1 APPLICABILITÉ ET OBJET**

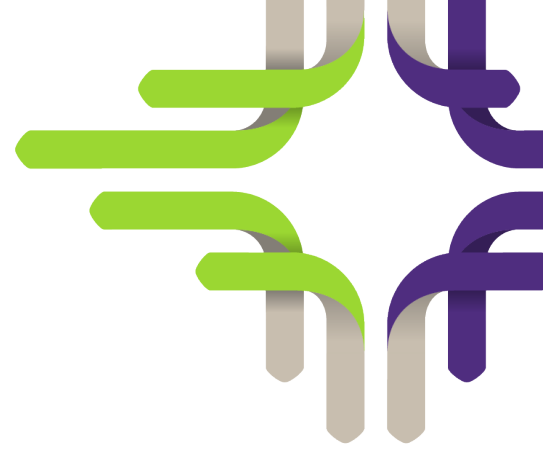
**1.1 Applicabilité**

Tout utilisateur externe invité à i) utiliser les ressources en technologies de l'information (TI) partagées de Raymond Chabot Grant Thornton S.E.N.C.R.L. (ci-après « RCGT » ou...  
... par le portail /... (ci-après le...

Please click Accept to confirm that you have read and understood the terms of use.

Decline Accept





## Your new account is ready

**If you are a new clientAccess user,** your last step is to fill in your profile information and click on *Save*.

The screenshot shows a web form with two main sections: 'PERSONAL INFORMATION' and 'USER PROFILE'. On the left, there is a navigation menu with 'Personal Information' selected and 'User Profile' below it. The 'PERSONAL INFORMATION' section contains input fields for First Name, Last Name, Job Title, Phone Number (with a country code dropdown), Ext., and Cell Phone Number (with a country code dropdown). The 'USER PROFILE' section contains a Username field (pre-filled with 'jli@lsmna@rcgt.com') and a Language dropdown menu. A 'Save' button with a checkmark is located at the bottom right of the form.

You are authenticated in clientAccess and can view your mandates.



Access the Help Centre.



Call our phone support line.

The screenshot shows the clientAccess dashboard. At the top, there is a navigation bar with 'My Projects', a user profile for 'Jane Smith', and icons for help, search, and navigation. The main content area starts with a 'Hello Jane,' greeting. Below this is a 'PROJECTS' section with the heading 'La société de démonstration'. There are two project cards: the first is 'Société de démonstration - Mission confidentielle-005 - 0000000' with '0 Invoice to pay'; the second is 'Société de démonstration - Mission Business JEP-001 - 0000000'. Each card has a small circular icon on the left.

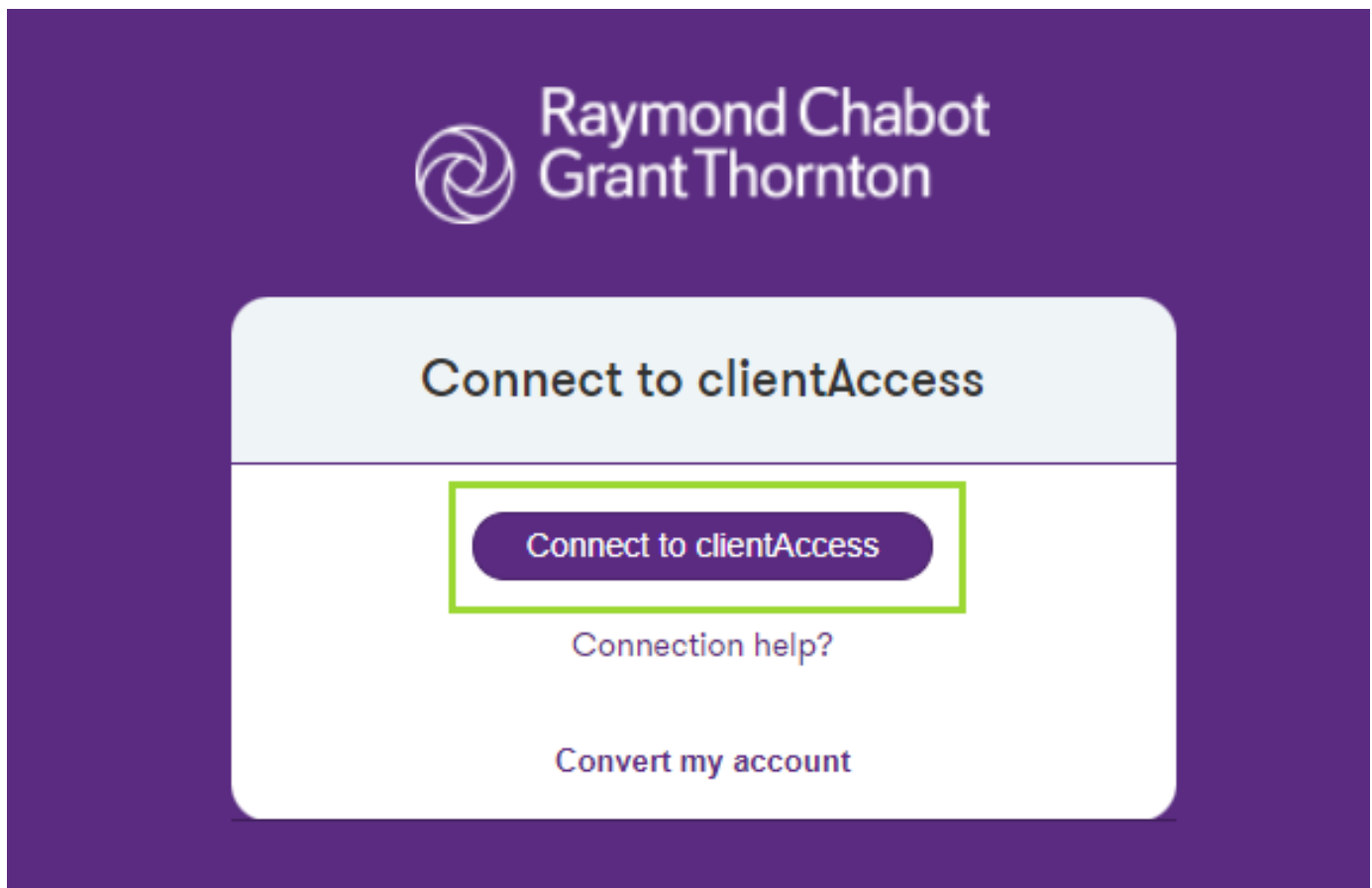


# Connecting to your clientAccess

## 1 On the Connection page

Access the connection page at <https://espaceclient.rcgt.com>

Click on the *clientAccess Connection* button.



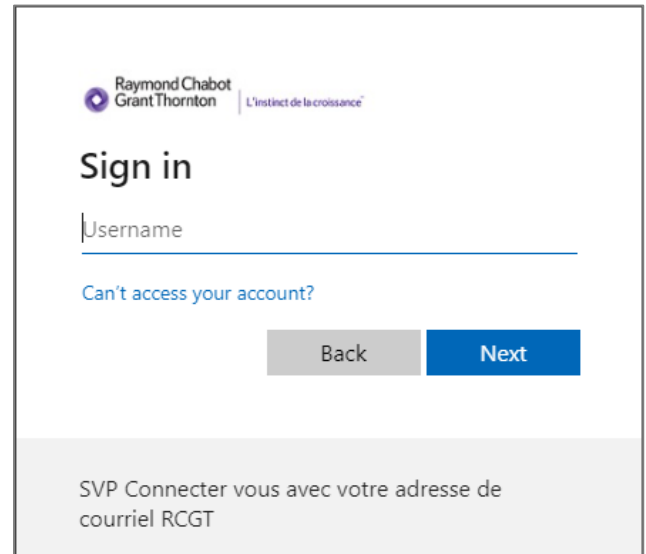


## 2 Enter your email address.

Enter your email address:  
the one you provided to your  
Raymond Chabot Grant  
Thornton consultant.

OR

Choose the address you  
provided to your  
Raymond Chabot Grant  
Thornton advisor.



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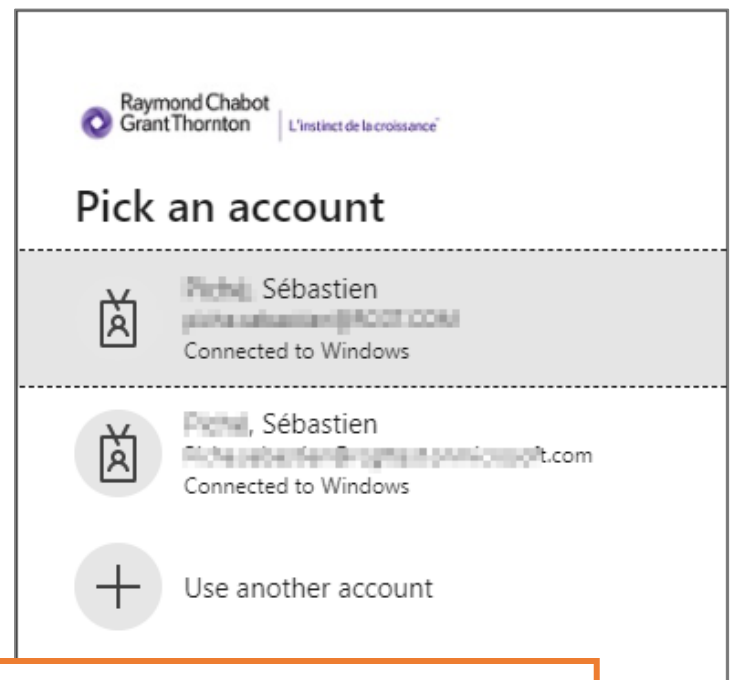
### Sign in

Username

[Can't access your account?](#)


Back Next


SVP Connecter vous avec votre adresse de courriel RCGT




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### Pick an account

 Piche, Sébastien  
piche.sebastien@RCGT.COM  
Connected to Windows

 Piche, Sébastien  
piche.sebastien@rcgmt.com@microsoft.com  
Connected to Windows

 Use another account

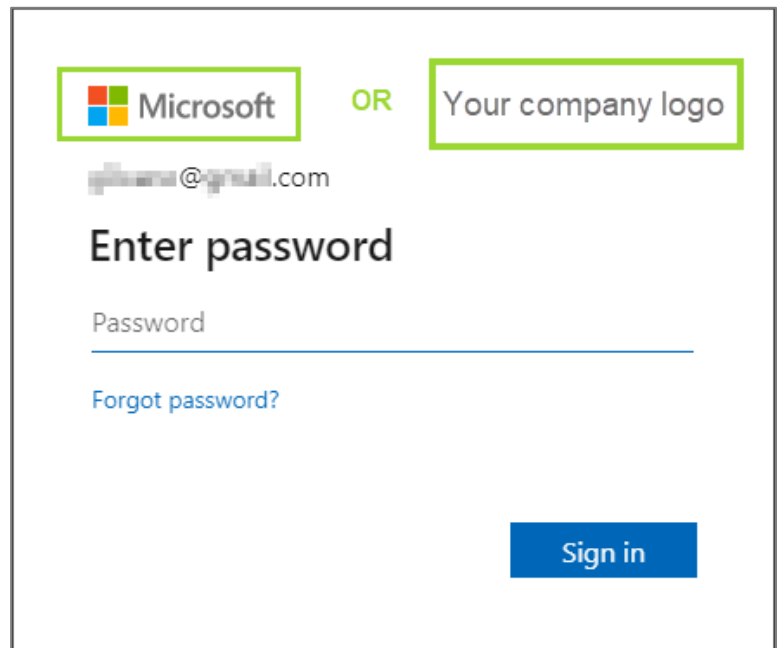
**Note:** In some specific cases, you will be directed to the double authentication step.



3

## Authenticate

**If your email address is linked to a Microsoft account**, enter your Microsoft account password, then click on *Sign in*.



Microsoft OR Your company logo

██████████@gmail.com

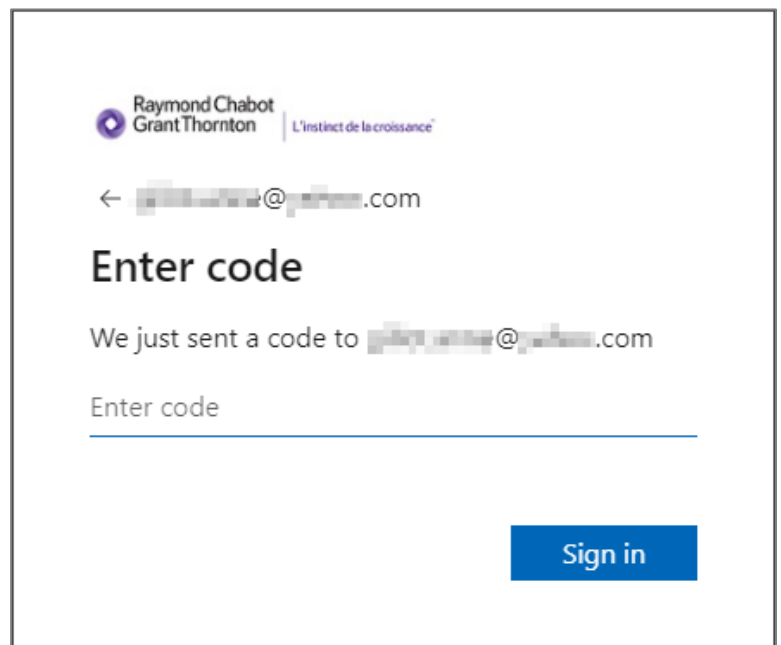
### Enter password

Password

[Forgot password?](#)

**Sign in**

**If your email address is not linked to a Microsoft account**, you will receive a unique code by email. Enter the code on the screen and click on *Sign in*.



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← ██████████@██████████.com

### Enter code

We just sent a code to ██████████@██████████.com

Enter code

**Sign in**

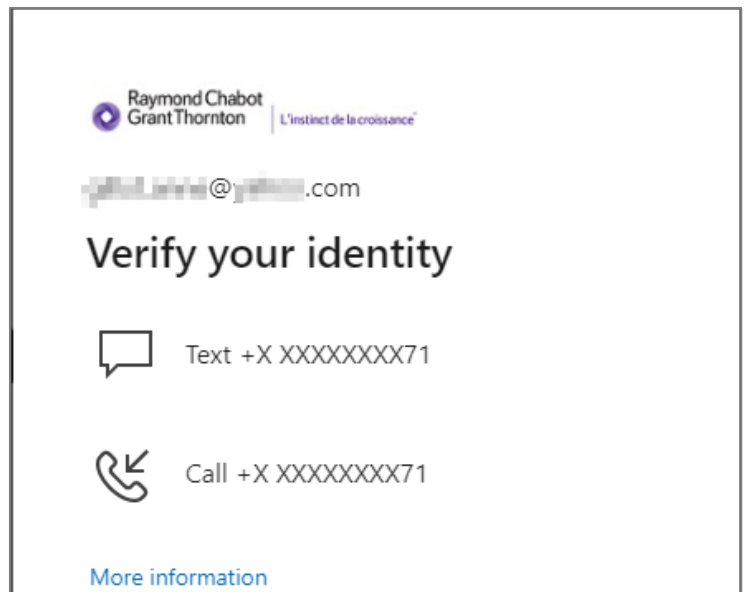


# 4

## Two-factor Authentication step

Indicate your two-factor authentication preference:  
Receiving a code by text message, or  
Answering a phone call.  
*(The options offered at this stage depend on the choices made during the configuration)*

If you opted to receive a code by text message, enter it on the screen and click on *Verify*.



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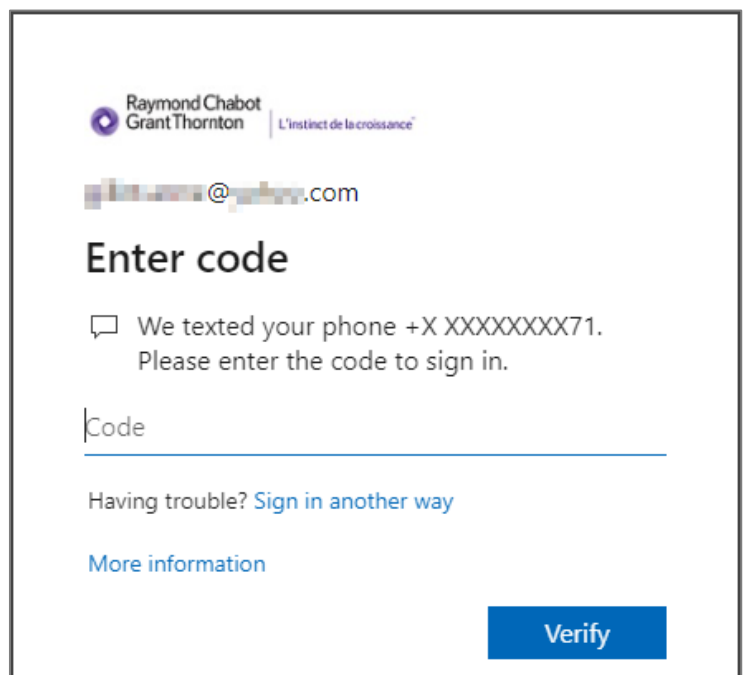
██████████@██████████.com

### Verify your identity

Text +X XXXXXXXXXX71

Call +X XXXXXXXXXX71

[More information](#)



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██████████@██████████.com

### Enter code

We texted your phone +X XXXXXXXXXX71.  
Please enter the code to sign in.

Code

Having trouble? [Sign in another way](#)

[More information](#)

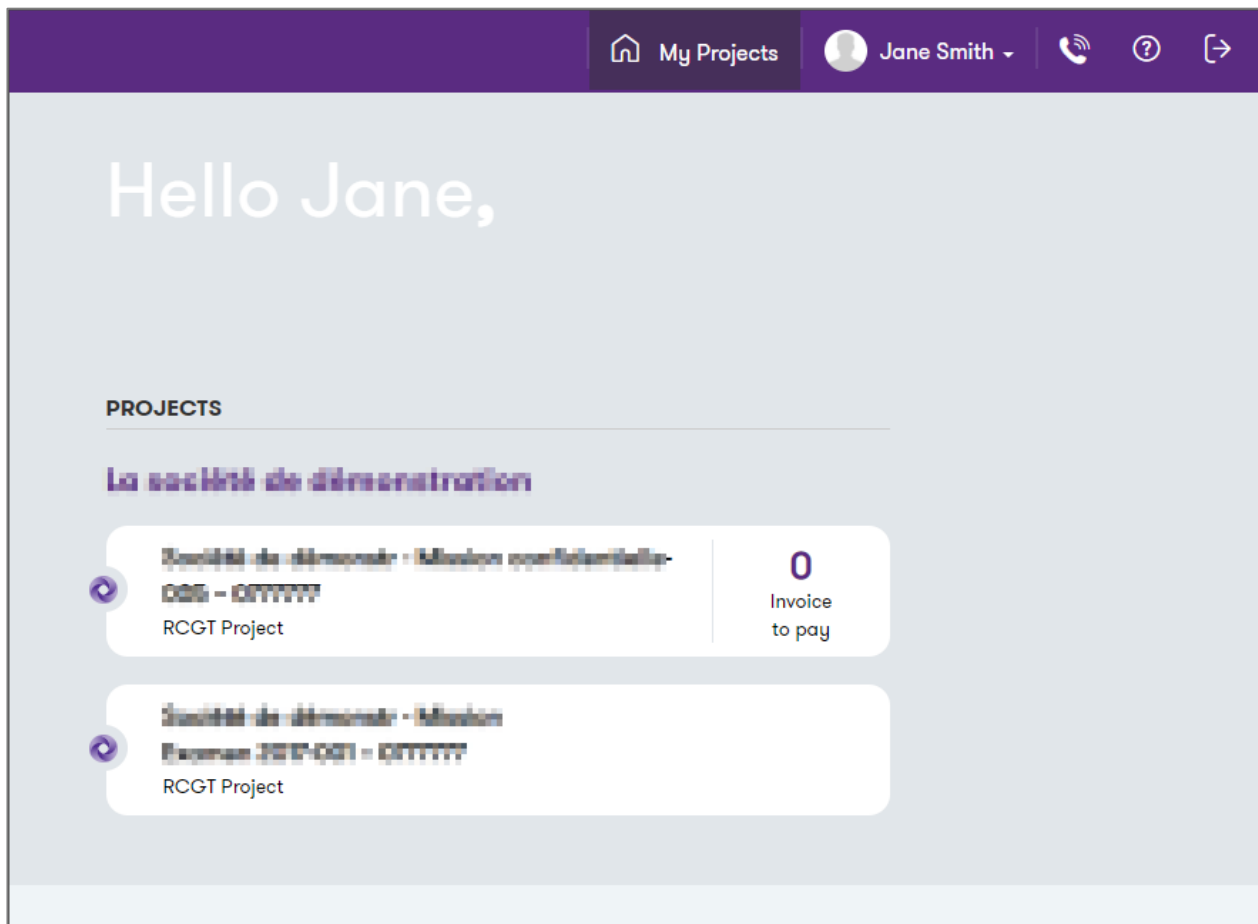
[Verify](#)



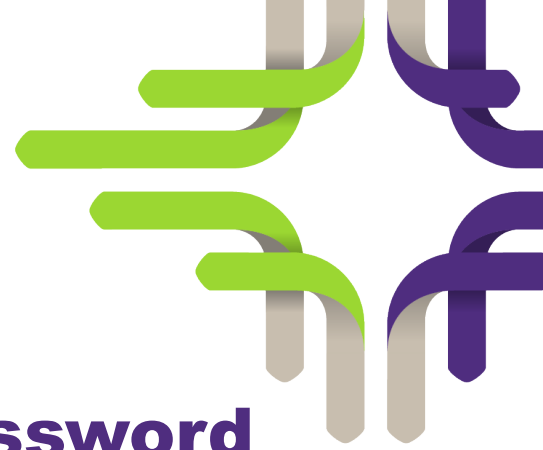
## You have access to clientAccess

You are now connected to clientAccess and can view your mandates documents. You can:

- upload documents for your RCGT consultant;
- recover documents posted by your consultant;
- collaborate on documents with your consultant.



The screenshot displays the clientAccess interface. At the top, a purple navigation bar includes a home icon, 'My Projects', a user profile for 'Jane Smith', and icons for notifications, help, and a search function. The main content area is light gray and features a personalized greeting 'Hello Jane,'. Below this, a 'PROJECTS' section is titled 'La société de démonstration'. Two project cards are visible: the first shows '0 Invoice to pay' and the second shows 'RCGT Project'.

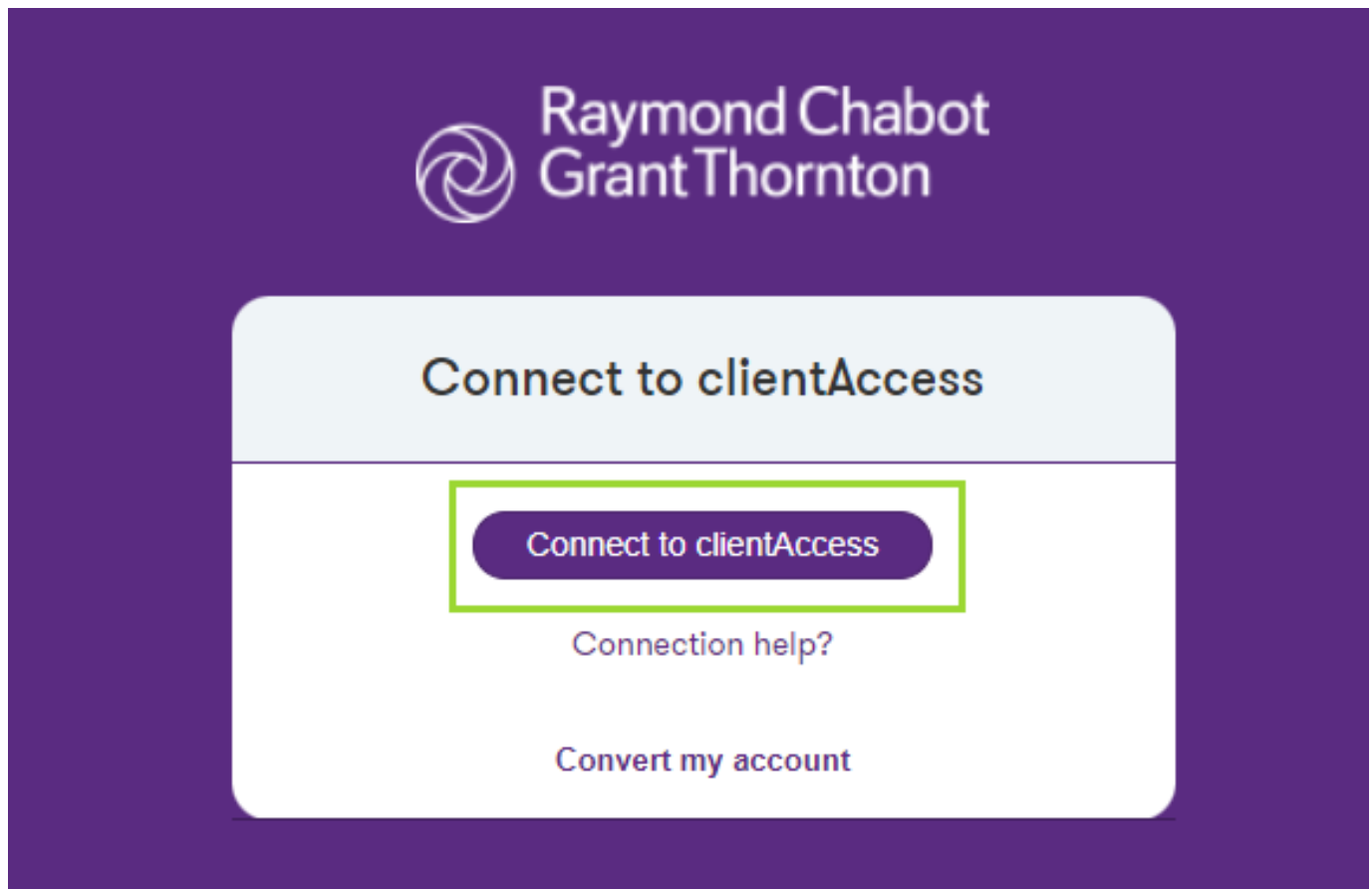


# I Forgot my Microsoft Password

1

On the homepage, start the authentication

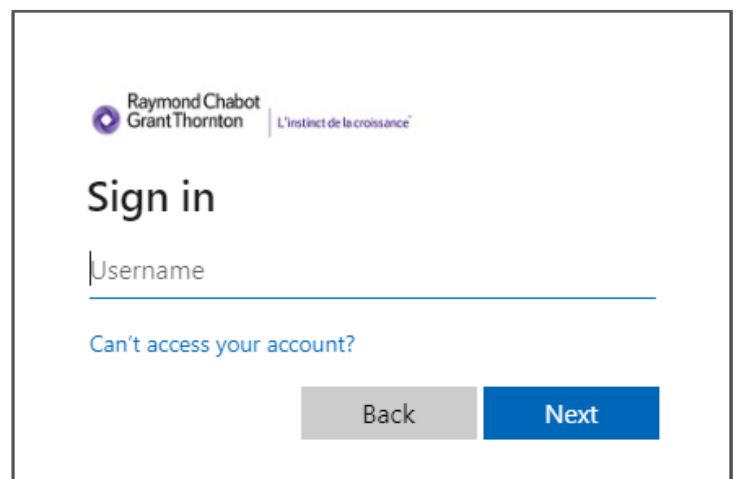
Click on *Connect to clientAccess*.





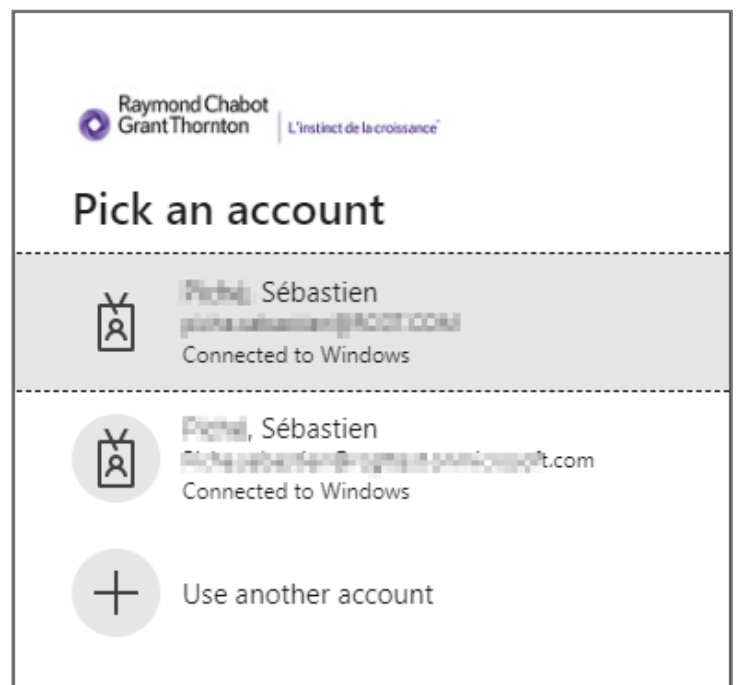
## 2 Indicate your e-mail address

Enter the e-mail address you provided to your Raymond Chabot Grant Thornton consultant.  
Click on *Next*.

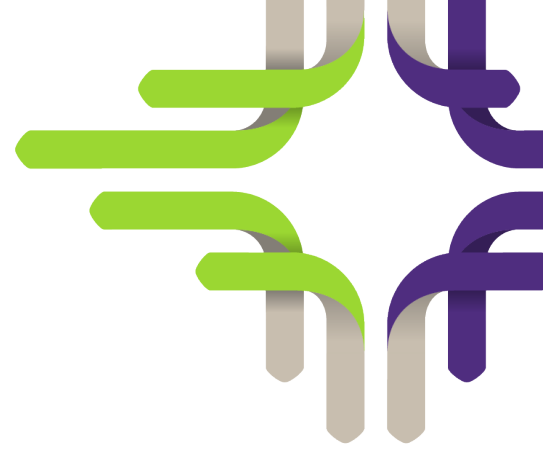


OR

Choose the address you provided to your Raymond Chabot Grant Thornton consultant.

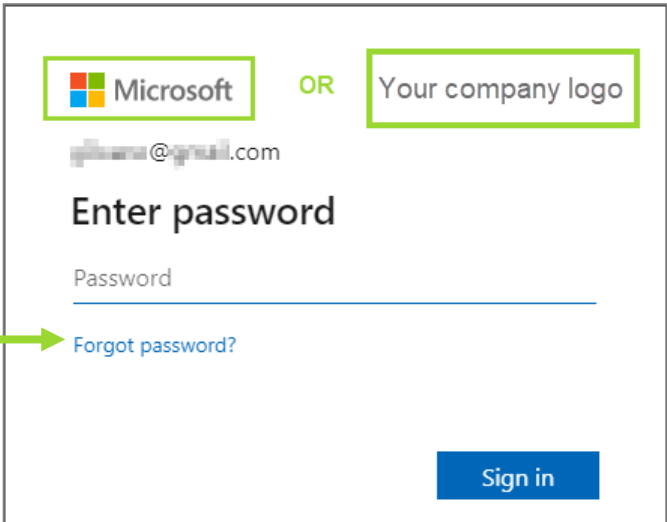






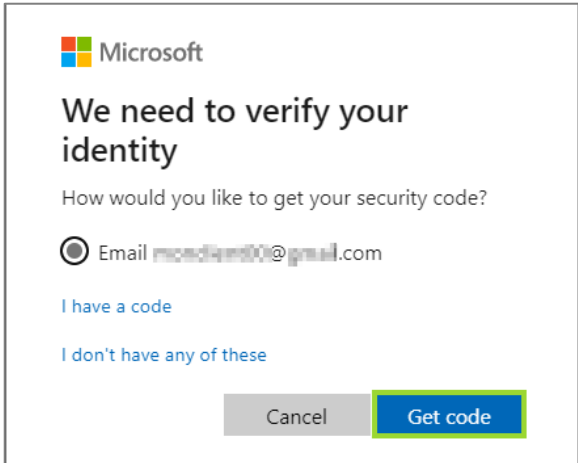
### 3 Follow the steps to reset your password.

Click on *Forgot password*.

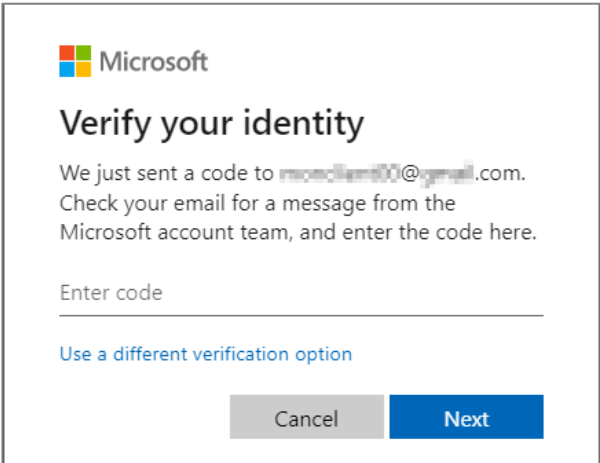


Microsoft OR Your company logo  
monclant00@gmail.com  
Enter password  
Password  
Forgot password?  
Sign in

Click on *Get Code*: it will be sent to you immediately by email.  
Enter the code on the next screen: *Verify your identity*, then click *Next*.



Microsoft  
We need to verify your identity  
How would you like to get your security code?  
 Email monclant00@gmail.com  
I have a code  
I don't have any of these  
Cancel Get code

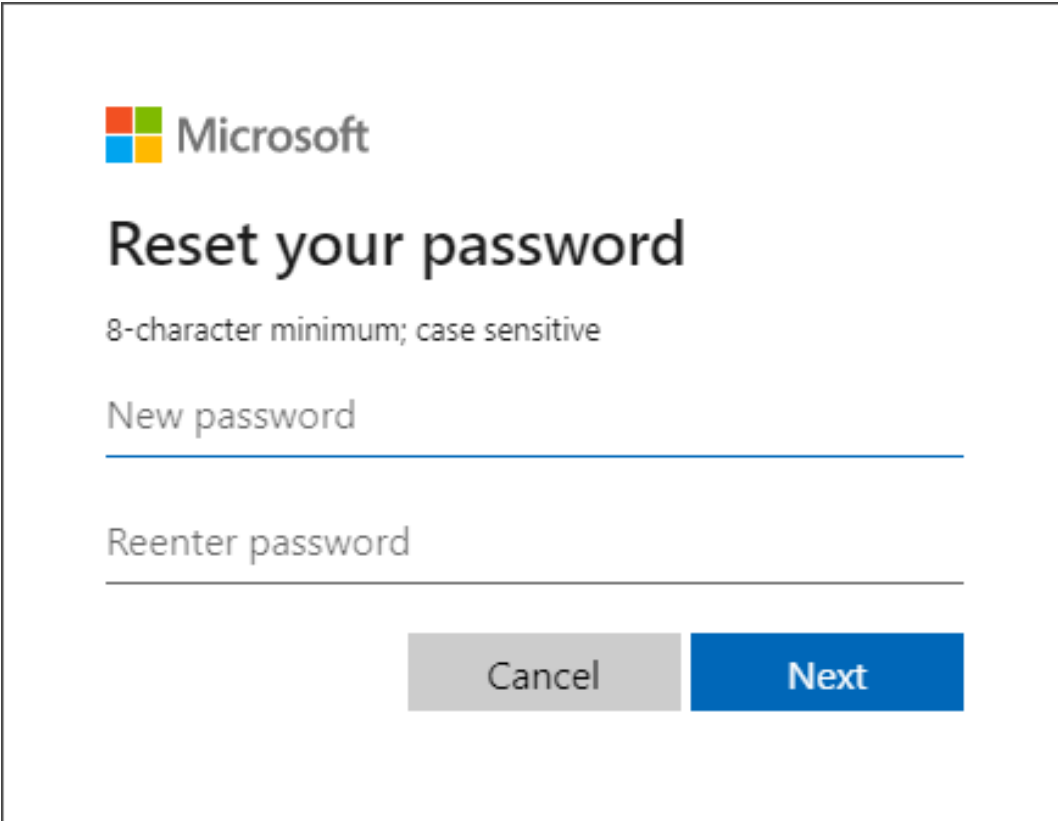


Microsoft  
Verify your identity  
We just sent a code to monclant00@gmail.com. Check your email for a message from the Microsoft account team, and enter the code here.  
Enter code  
Use a different verification option  
Cancel Next



## 4 Choose your new password

Enter your new password twice and validate by clicking *Next*.



The screenshot shows the Microsoft password reset interface. At the top left is the Microsoft logo. Below it, the text reads "Reset your password" in a large, bold font. Underneath, it specifies "8-character minimum; case sensitive". There are two input fields: "New password" and "Reenter password", each with a blue underline. At the bottom right, there are two buttons: a grey "Cancel" button and a blue "Next" button.



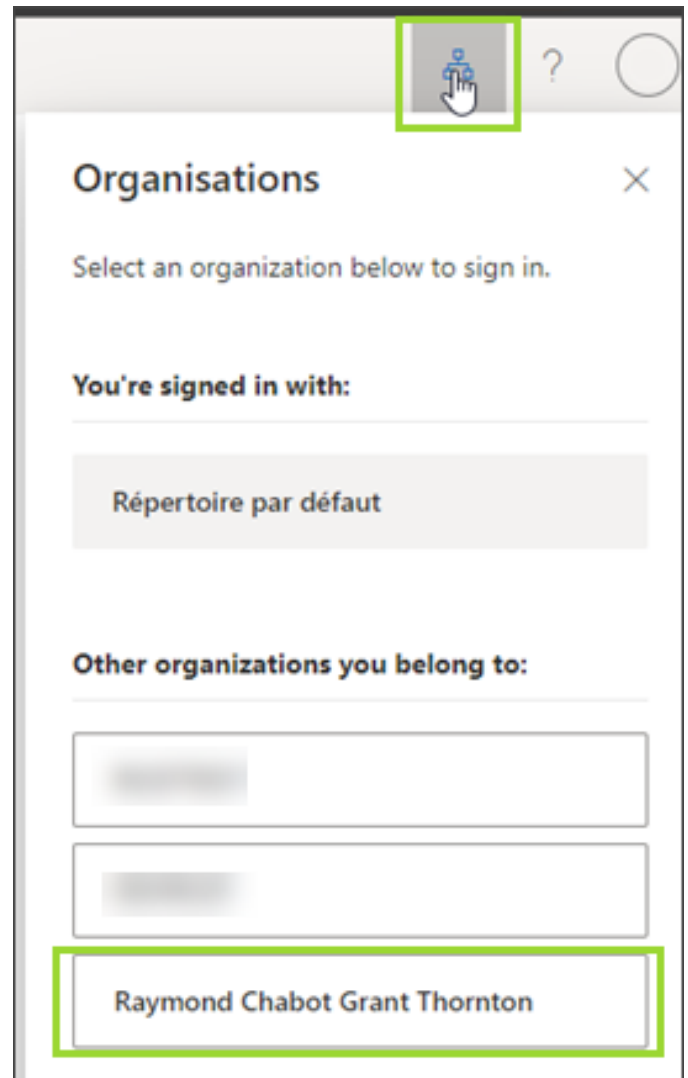
# Editing two-factor Authentication

## 1 Access the MyApps site

Go to:

<https://myapplications.microsoft.com>

In the top right corner, click on the organization chart icon to ensure you select the Raymond Chabot Grant Thornton environment.

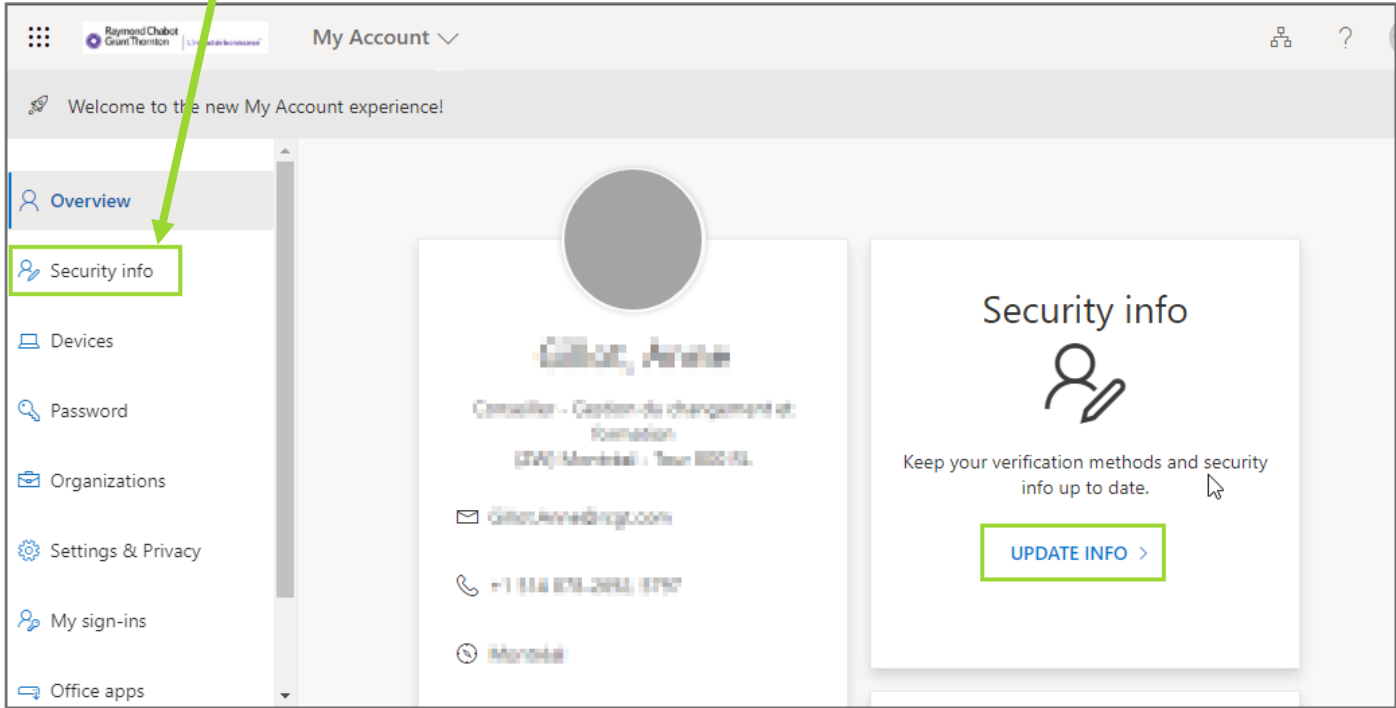
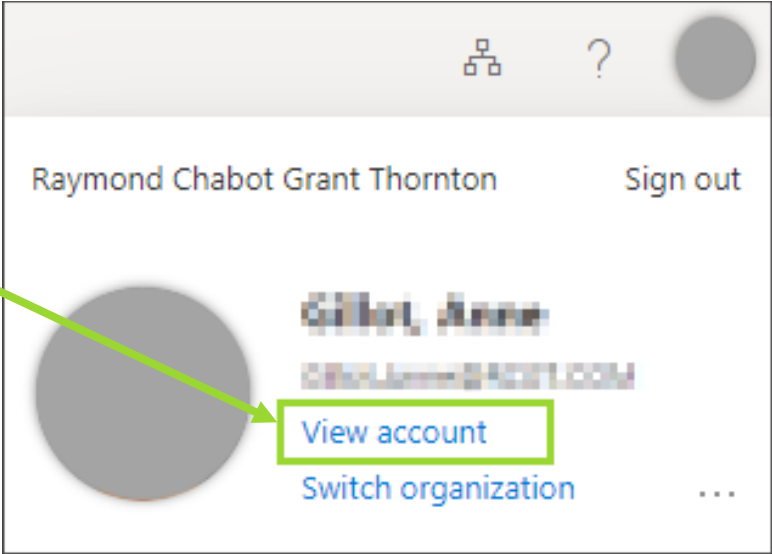


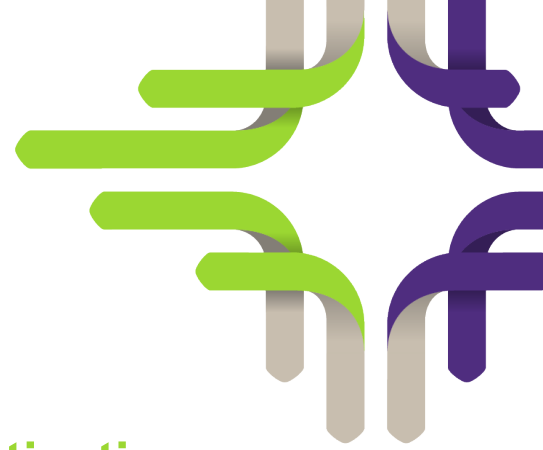


## 2 Go to your account settings

Click on the profile icon and then on *Show account*.

In the page that is displayed, click to access the security information.



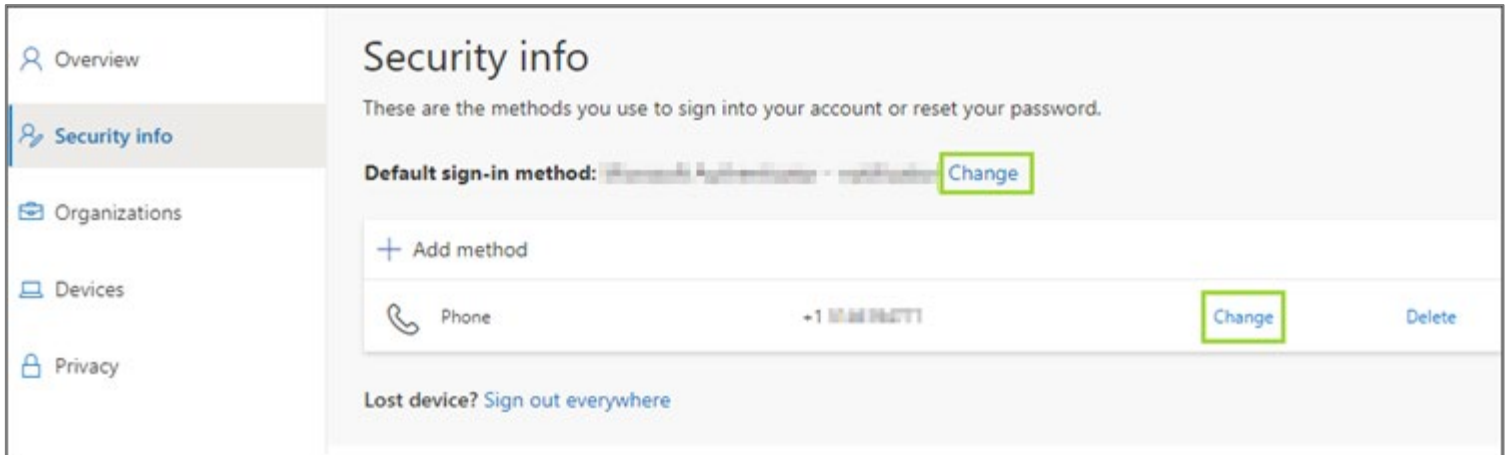


## **3** Change your two-factor authentication settings

To access the security info page, you must first authenticate yourself with two-factor authentication.

Click on *Edit* to change the phone number.

**Important:** If you no longer have access to the phone saved in the settings and cannot access the security information, contact our support at: 1-844-5espace (1-844-537-7223).



The screenshot shows the Microsoft Security Info interface. On the left is a navigation menu with 'Security info' selected. The main content area is titled 'Security info' and contains the following elements:

- A sub-header: 'These are the methods you use to sign into your account or reset your password.'
- A 'Default sign-in method' section with a 'Change' button highlighted in green.
- An '+ Add method' button.
- A list of methods, including a 'Phone' entry with the number '+1 514 882 2271', a 'Change' button highlighted in green, and a 'Delete' button.
- A link at the bottom: 'Lost device? Sign out everywhere'.



# clientAccess



Simple



Secure



Quick

Thank you for trusting Raymond Chabot Grant Thornton. If you have any questions regarding your account, please contact us at

1-844-5espace (1-844-537-7223)

**The Raymond Chabot Grant Thornton team**