

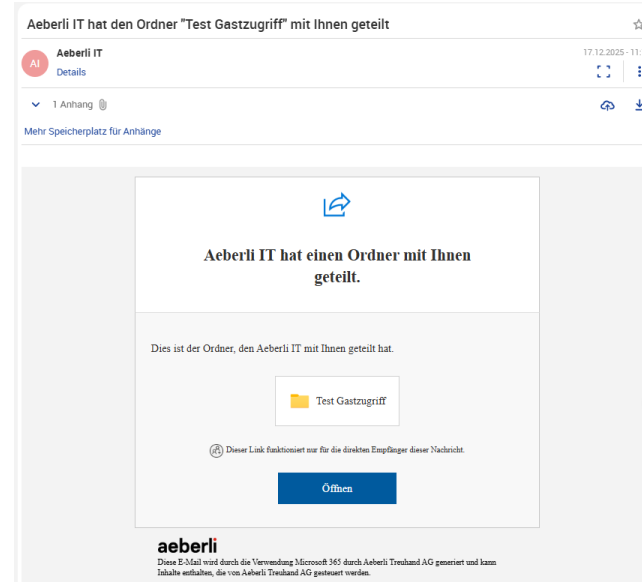
Client Portal Instructions

Option 1: Login with Verification Code

You will receive an email from Aeberli Treuhand AG inviting you to collaborate on your personal client SharePoint page.

Step 1: Open the link

Open the link in the email you received.



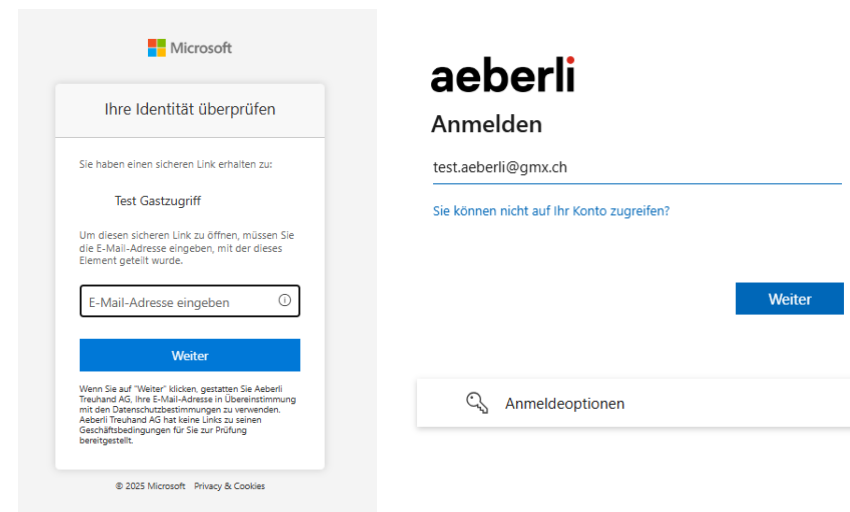
Step 2: Sign in

A Microsoft sign-in window will appear.

- Enter your **email address**.

The Aeberli login window will then appear.

- Enter your **email address again** and click **“Next”**.



Step 3: Enter verification code

You will receive a **verification code** by email. Enter this code in the displayed input field and confirm.



Step 4: Confirm first login

When logging in for the first time, a security prompt will appear.

Please confirm this to allow access.

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test.aeberli@gmx.ch

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a Aeberli Treuhand AG
aeberlitreuhandch.onmicrosoft.com

Durch Akzeptieren gestatten Sie dieser Organisation Folgendes:

- ✓ Ihre Profildaten empfangen
- ✓ Ihre Aktivität erfassen und protokollieren
- ✓ Ihre Profildaten und Aktivitätsdaten verwenden

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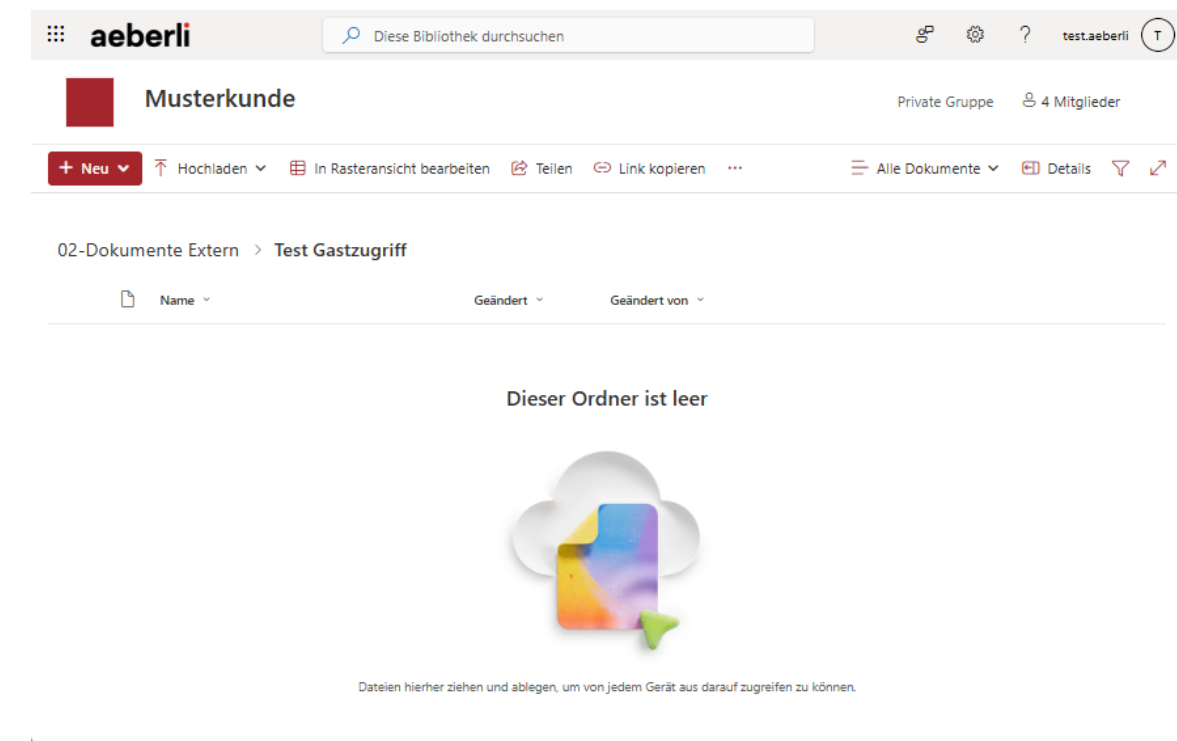
[Weitere Informationen](#)

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Step 5: Access the client portal

After successful login, you will be on your client SharePoint page.

Under **“Start”**, you will find general information about the portal and your collaboration with Aeberli.



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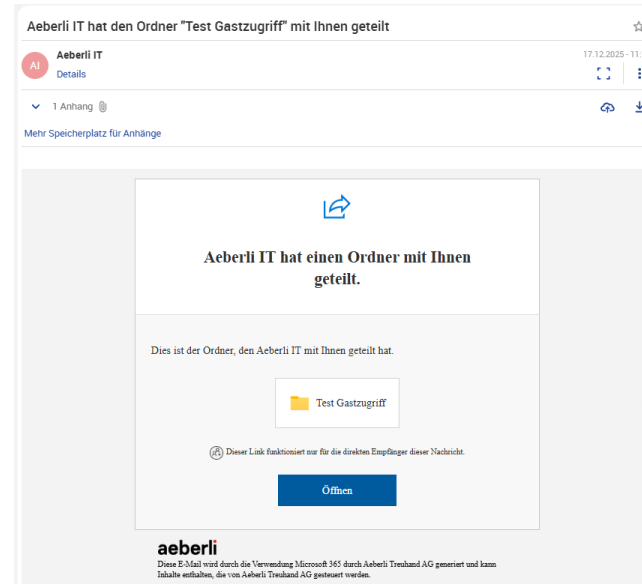
Client Portal Instructions

Option 2: Login with Microsoft Account

You will receive an email from Aeberli Treuhand AG inviting you to collaborate on your personal client SharePoint page.

Step 1: Open the link

Open the link in the email you received.



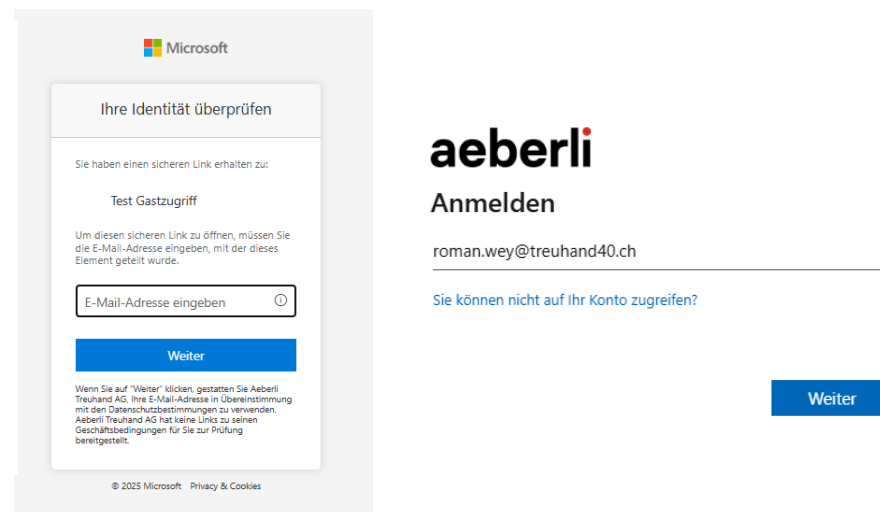
Step 2: Sign in

A Microsoft sign-in window will appear.

- Enter your **email address**.

The Aeberli login window will then appear.

- Enter your **email address again** and click **“Next”**.



Step 3: Enter password

A new window will appear asking for your **Microsoft account password**.

This password is **not stored by Aeberli**; it is used solely to authenticate your account.



Step 4: Confirm first login

When logging in for the first time, a security prompt will appear.

Please confirm this to allow access.

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[Weitere Informationen](#)

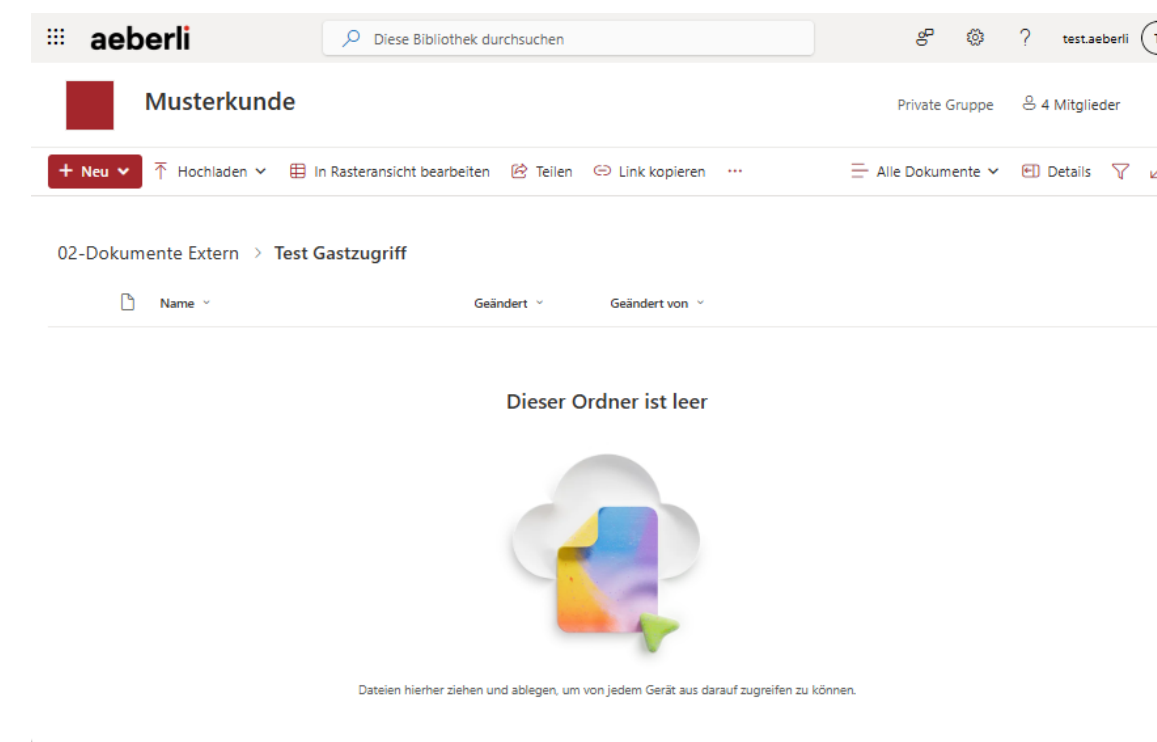
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[Abbrechen](#) [Akzeptieren](#)

Step 5: Access the client portal

After successful login, you will be on your client SharePoint page.

Under **“Start”**, you will find general information about the portal and your collaboration with Aeberli.



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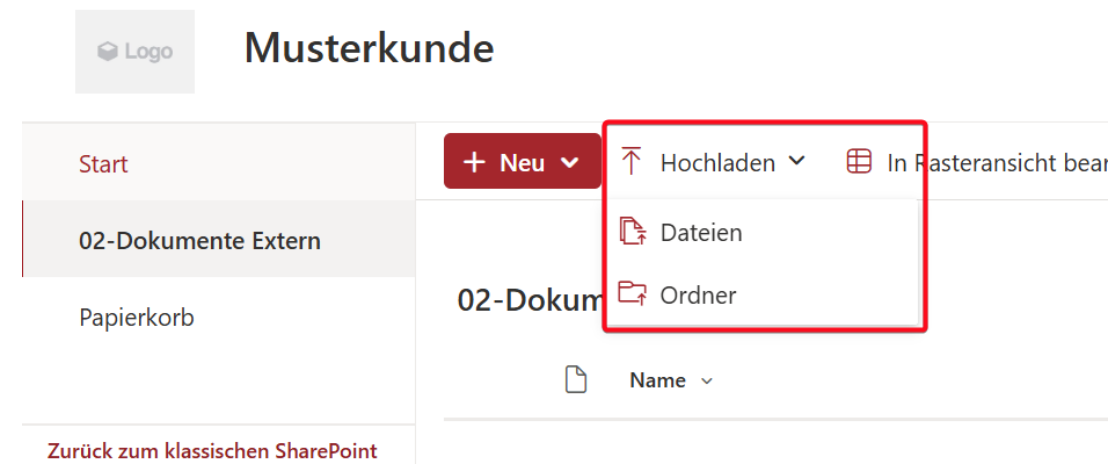
Client Portal Instructions

Data Upload in the Client Portal

Step 1: Upload documents

You have two options:

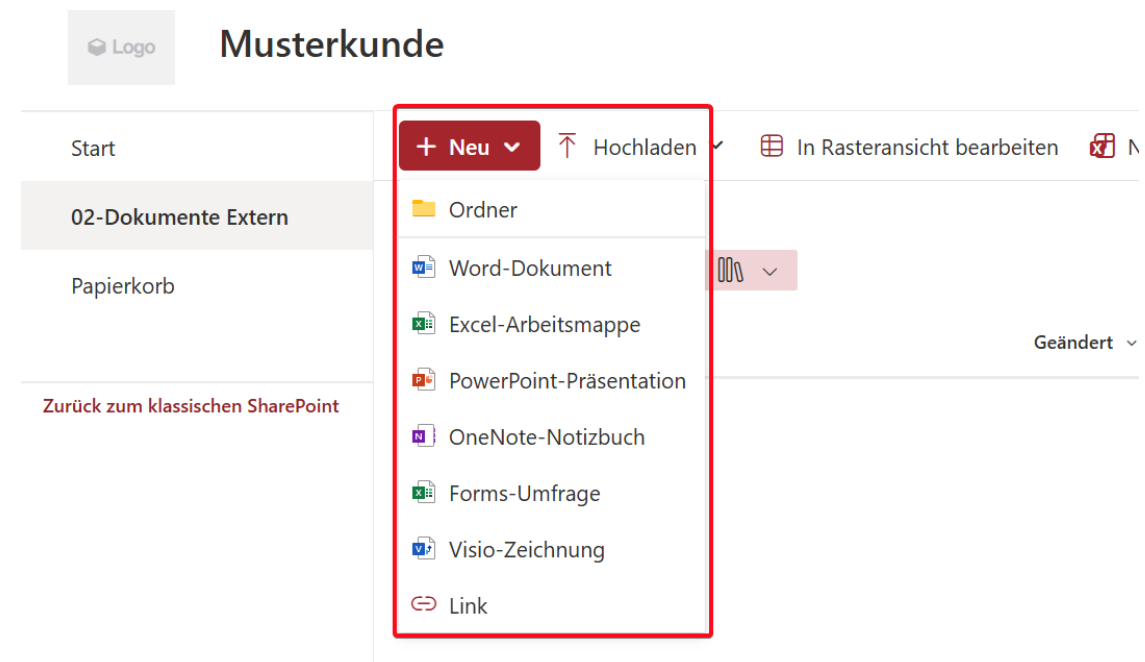
- **“Upload” button:** Select files from your device.
- **Drag & Drop:** Drag files directly into the upload window.



Step 2: Create new folders or documents

Using the “+ New” button, you can:

- Create new folders
- Create new files directly (e.g., Word, Excel)



Support

Mail an: it@aeberli.ch