

Using Your Client Portal

A quick guide to working with Bluebonnet through Financial Cents.

1 / Open your invitation

Use the portal invitation or request link sent to your agreed email address. Financial Cents supports passwordless access; follow the verification prompts shown.

Keep access links private. Contact Bluebonnet if your email address changes or you cannot access the portal.

2 / Respond to requests

Open each request, read the instructions and due date, and provide the requested information or files. Use the request conversation for related questions.

If something is unavailable, explain what is missing and when you expect to have it. Check which requests remain outstanding.

3 / Upload clear records

Upload readable, complete files with descriptive names. Confirm the correct business and reporting period before sending.

Shared folders and uploads outside a request depend on the permissions Bluebonnet enables. If you cannot find a place for a file, ask us where to send it.

4 / Review shared information

Review documents and reports shared with you and respond to follow-up questions. Available items depend on your service scope and portal setup.

If an upload or link does not work, contact genna@bluebonnetledgerco.com and describe the issue. Avoid attaching sensitive records to a troubleshooting email.

A quick check before you finish

Have I answered each question and included all pages?

Are my files for the correct month and account?

Have I explained any missing information?

Never send bank passwords or one-time verification codes. Use the access method agreed during onboarding.

Official reference: Financial Cents: Client Portal Overview. Reviewed September 22, 2026.