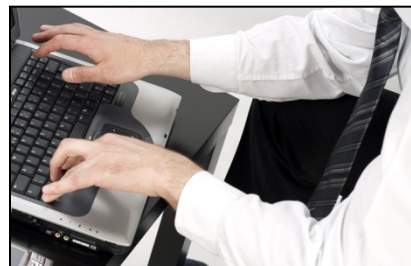


**PERELSON
WEINER_{LLP}**
CERTIFIED PUBLIC ACCOUNTANTS

Client Portal NetClient CS Solution

New User Guide



Using the PerelsonWeiner Client Portal – NetClient CS Solution

Please note: Online, self-paced learning tutorials can be found on our website at www.pwcpa.com. Click on the “Client Portal” link and review the “Tips and Tutorials” section.

The home page of the PWCPA Client Portal solution provides you with the features/options listed below:

- A. **My Account** – Allows a user to view and update their Login, Name, Email Address, Password and Security Questions
- B. **Sign Out** – Allows a user to sign out and end their session of the Client Portal
- C. **Help Menu** – Provides a menu of help topics for using the Client Portal
- D. **Document Management / Client Flow** – Allows a user to view all documents they have access to
- E. **Home** – Allows a user to return back to the Home view of the Client Portal

See Image Below:

The screenshot shows a web browser window displaying the NetClient CS Client Portal. The browser's address bar shows the URL "NetClient CS > Home > Dashboard". The page header features the Perelson Weiner LLP logo on the left and contact information on the right: "One Dag Hammar skjold Plaza, New York, NY 10017-2201, Ph: 212-605-3100 Fax: 212-605-3128". Below the header, a navigation bar includes "Welcome to NetClient CS, Portal Admin" and "My Account Sign Out". The main content area is divided into two sections: a left sidebar and a main dashboard. The sidebar, titled "Home", contains a list of actions: "Dashboard", "My Account", "Home", and "Document Management". The main dashboard, titled "Dashboard", displays the date "Monday, March 07, 2011" and a large "Document Management" section with a yellow folder icon and the text "ClientFlow".

Accessing Documents

In order to access a document(s) available for your review, click on the Client Flow link. Depending on the number of accounts with the firm and permissions set by the Portal Administrator, one or more client accounts may appear. Click on the desired Client Account. To quickly find a folder, type in part of the client name in the Find box.

NetClient CS > Document Management > ClientFlow

PERELSON WEINER LLP
CERTIFIED PUBLIC ACCOUNTANTS

One Dag Hammarskjold Plaza
New York, NY 10017-2201
Ph: 212-605-3100 Fax: 212-605-3128

Welcome to NetClient CS, Portal Admin

My Account Sign Out

Document Management << **ClientFlow**

Action

- Dashboard
- ClientFlow

Home Document Management

Home Up

Find: Showing 1 of 1

Client Name	Client Number
JANUARY NON-BILLABLE TIME	90001000

A list of documents will appear if documents have been made available for your review or you have recently uploaded a document. To quickly find a folder, type in part of the client name in the Find box. **<image needs updating>** See image below:

ClientFlow

Home Up Upload

/ MATTHEWS, TEX & LORI

File Section	Document Type	Description	Year	Period End	Document Date
INDIVIDUAL TAX 1040	WORKPAPERS	TAX WORKPAPERS	2009	12/31	01/29/2010
INDIVIDUAL TAX 1040	TAX RETURN		2008	12/31	01/29/2010
INDIVIDUAL TAX 1040	TAX RETURN	FEDERAL TAX RETURN	2007	12/31	03/25/2010
INDIVIDUAL TAX 1040	TAX RETURN	FEDERAL TAX RETURN	2006	12/31	03/25/2010

Page 1 of 1 15 Displaying 1 to 4 of 4 items

Click on any document in the list to open the document up in view mode:

Form **1040** Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return 2007 (99) IRS Use Only—Do not write or staple in this space.

For the year Jan. 1-Dec. 31, 2007, or other tax year beginning , 2007, ending , 20 OMB No. 1545-0074

Label (See instructions on page 12.) Use the IRS label. Otherwise, please print or type.	L	Your first name and initial Michael R.	Last name Miller	Your social security number 111-11-1234
	A	If a joint return, spouse's first name and initial Karen A.	Last name Miller	Spouse's social security number 222-22-4567
H	Home address (number and street). If you have a P.O. box, see page 12. 4230 Woodhaven Drive			You must enter your SSN(s) above. ▲
	City, town or post office, state, and ZIP code. If you have a foreign address, see page 12. Canton MI 48187			
E	Apt. no.			Checking a box below will not change your tax or refund.

Presidential Election Campaign ▶ Check here if you, or your spouse if filing jointly, want \$3 to go to this fund (see page 12) ▶ You Spouse

Filing Status

1	<input type="checkbox"/> Single	4	<input type="checkbox"/> Head of household (with qualifying person). (See page 13.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
2	<input checked="" type="checkbox"/> Married filing jointly (even if only one had income)	5	<input type="checkbox"/> Qualifying widow(er) with dependent child (see page 14)
3	<input type="checkbox"/> Married filing separately. Enter spouse's SSN above and full name here. ▶		

Check only one box.

6a **Yourself.** If someone can claim you as a dependent, **do not** check box 6a

Boxes checked on 6a and 6b **2**

Please note:

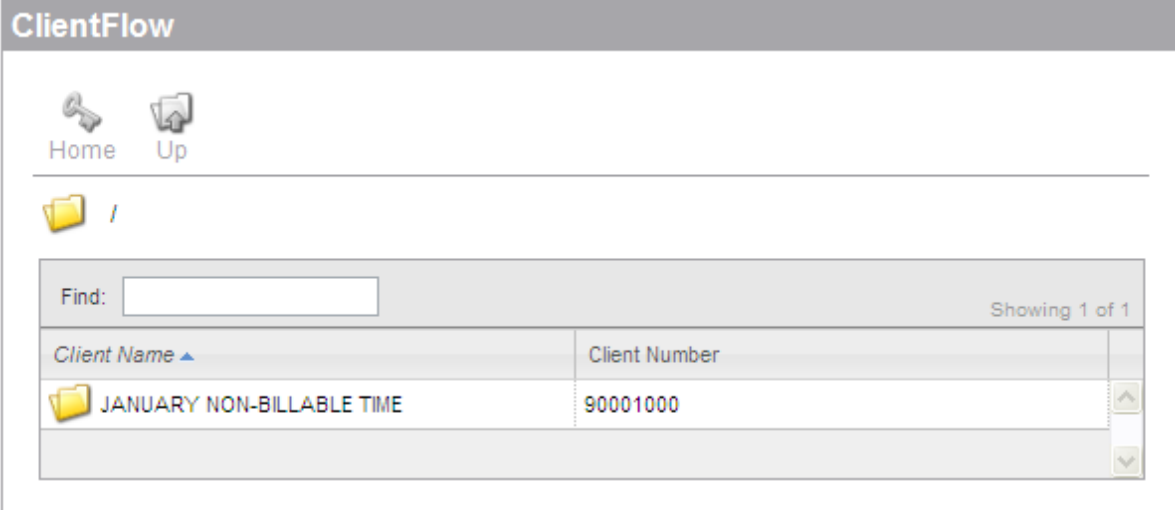
- Documents opened from the Client Portal are READ-ONLY and therefore cannot be edited. If the document requires editing, save a copy to the local drive (File > Save As), edit it as necessary, and then upload it to the Client Portal as a new document.
- Adobe Reader is required at minimum in order to review the documents. In some cases, Microsoft Office Word and/or Excel files may also be available for your review. In those instances the necessary software application must be installed in order for you to be able to view the document.

[You can download Adobe Reader by going to www.adobe.com](http://www.adobe.com)


Uploading Documents

The upload feature allows you to send documents to your PWCPA Tax Advisor using encryption technology to protect your private information. Follow the steps below to upload a document into Client Flow.

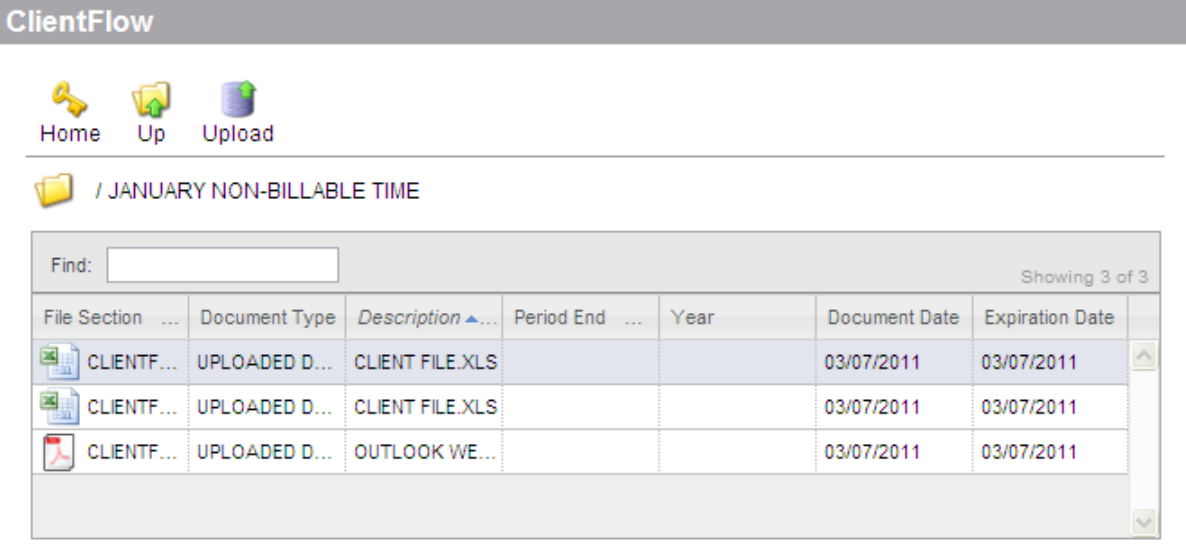
- 1) Select the appropriate client folder.






The screenshot shows the ClientFlow interface. At the top, there are navigation icons for Home (key) and Up (folder). Below these is a search bar labeled 'Find:' and a 'Showing 1 of 1' indicator. A table lists the search results:

Client Name ▲	Client Number
 JANUARY NON-BILLABLE TIME	90001000

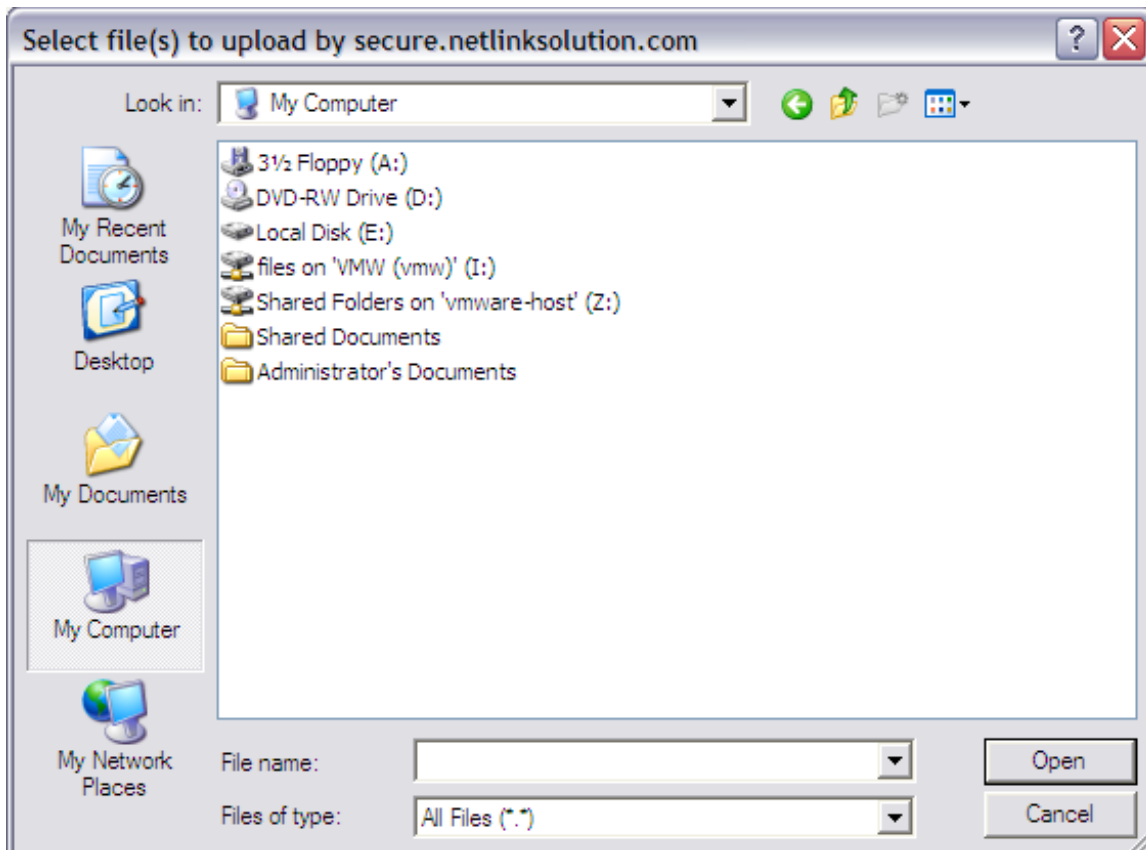
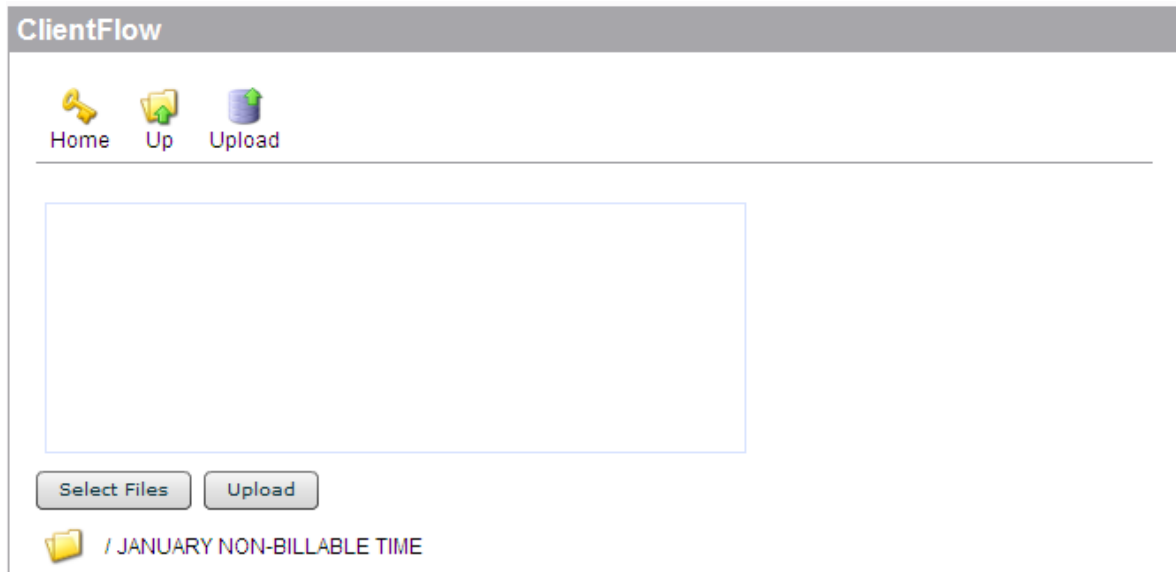
- 2) Click on the “Upload” option shown below:



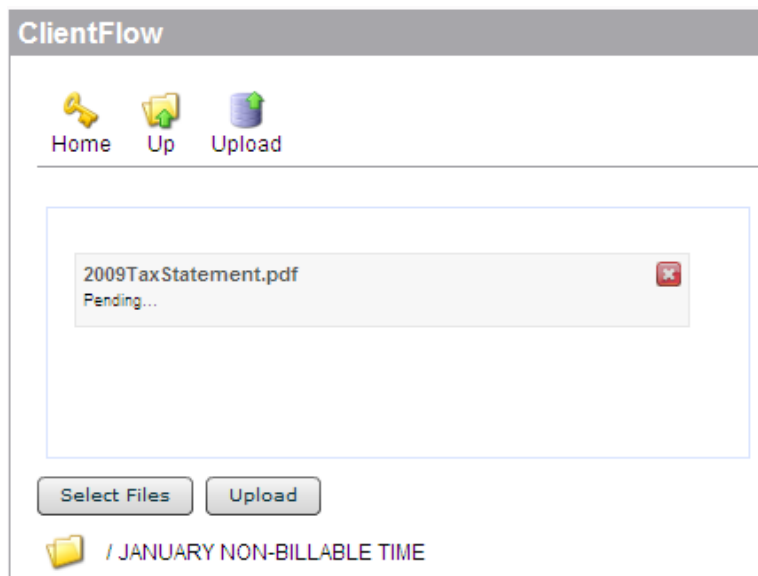
The screenshot shows the ClientFlow interface with the 'Upload' option (upload icon) selected in the navigation bar. The breadcrumb path is '/ JANUARY NON-BILLABLE TIME'. Below the search bar, a table displays the following data:

File Section ...	Document Type	Description ▲...	Period End ...	Year	Document Date	Expiration Date
 CLIENTF...	UPLOADED D...	CLIENT FILE.XLS			03/07/2011	03/07/2011
 CLIENTF...	UPLOADED D...	CLIENT FILE.XLS			03/07/2011	03/07/2011
 CLIENTF...	UPLOADED D...	OUTLOOK WE...			03/07/2011	03/07/2011

3) Click on the Select Files button and navigate through your files and select the file you wish to upload to the Client Portal. You may click the Select Files button again to upload multiple files to the Client Folder.



Click on the "Upload" button. Click on the red "X" next to the file name to cancel the file if necessary.



By Default, after a document has been uploaded it will become viewable under your list of documents in the Client Portal.

You can end your Client Portal session by clicking on the "Sign Out" option.

Please Note:

- You will be notified by your PWCPA Tax Advisor once a document is published to the Client Portal for your review.
- Documents of any type of file can be uploaded to the Client Portal except for TIFF files.
 - TIFF files will be converted to PDF files after upload.
- 1000 MB is the maximum file size that can be uploaded through the Client Portal at one time.
- Please contact your PWCPA Tax Advisor if you upload a document and time is of the essence.
- PWCPA determines which documents are published to the Client Portal and reserves the right to unpublish a document as necessary.

If you have any questions, please contact the PerelsonWeiner Portal Administrator by email at: portal@pwcpa.com or leave a voicemail at XXX-XXX-XXXX