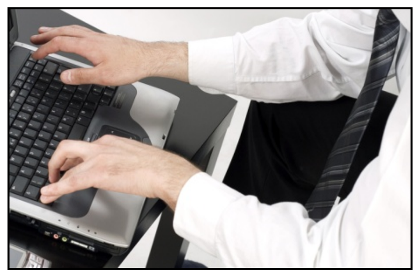
PERELSON WEINER LLP
CERTIFIED PUBLIC ACCOUNTANTS

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

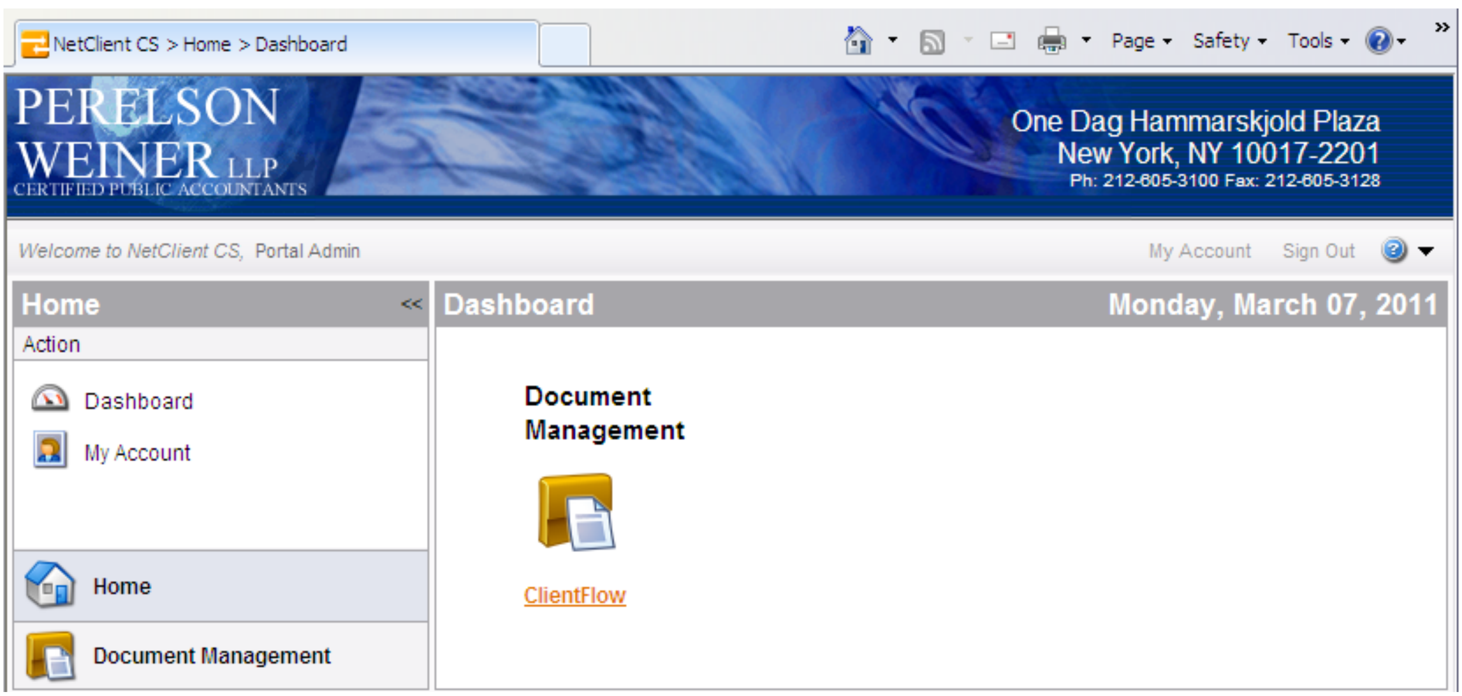
B. **Sign Out –** Allows a user to sign out and end their session of the Client Portal

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

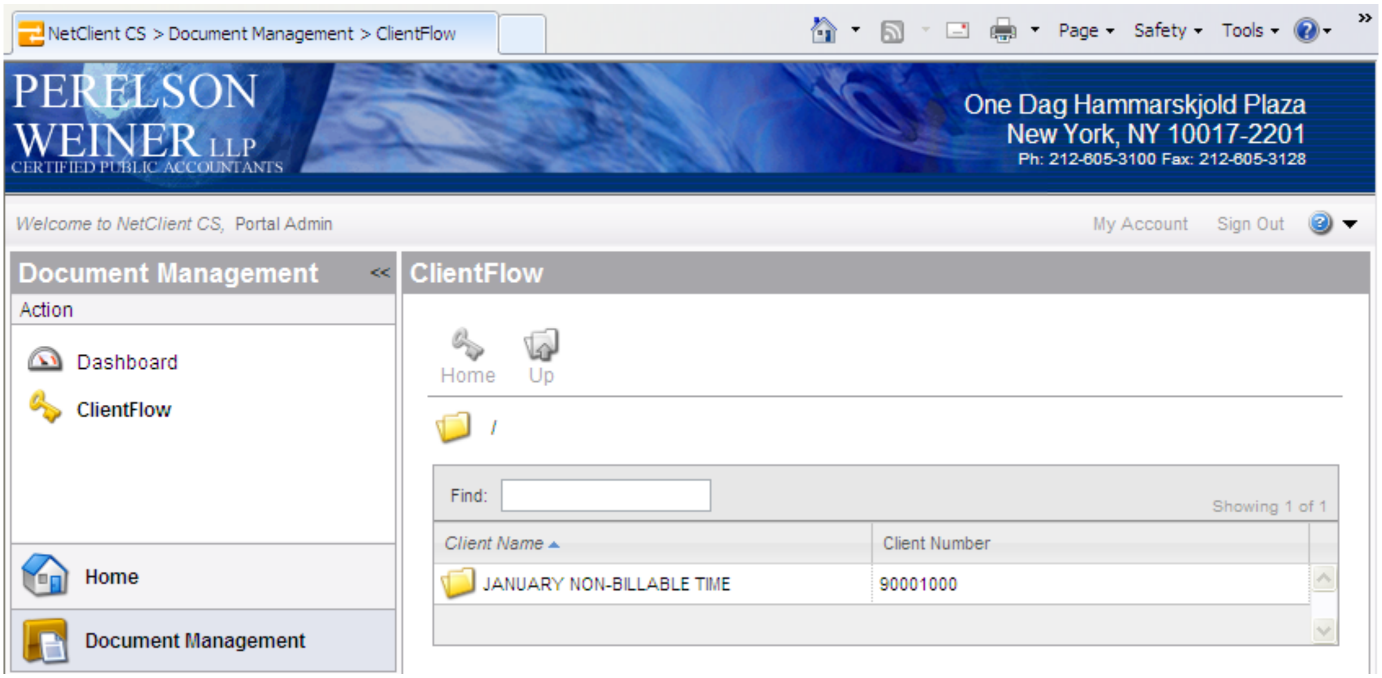
E. **Home –** Allows a user to return back to the Home view of the Client Portal

See Image Below:

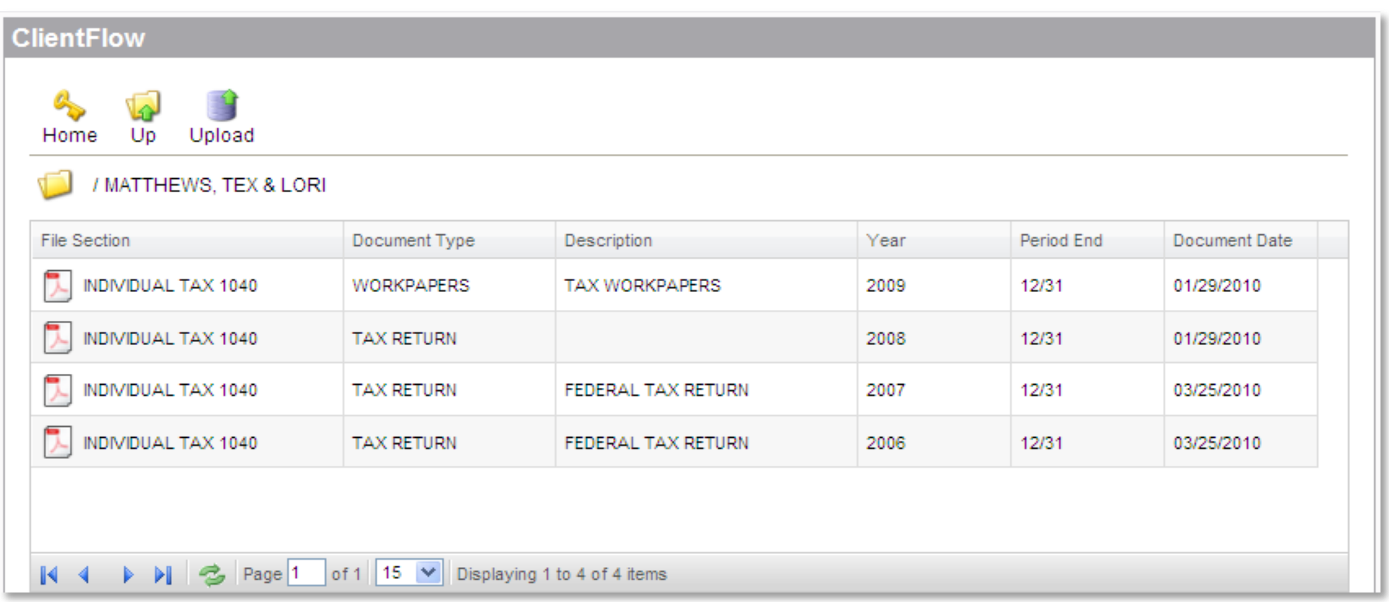


Accessing Documents

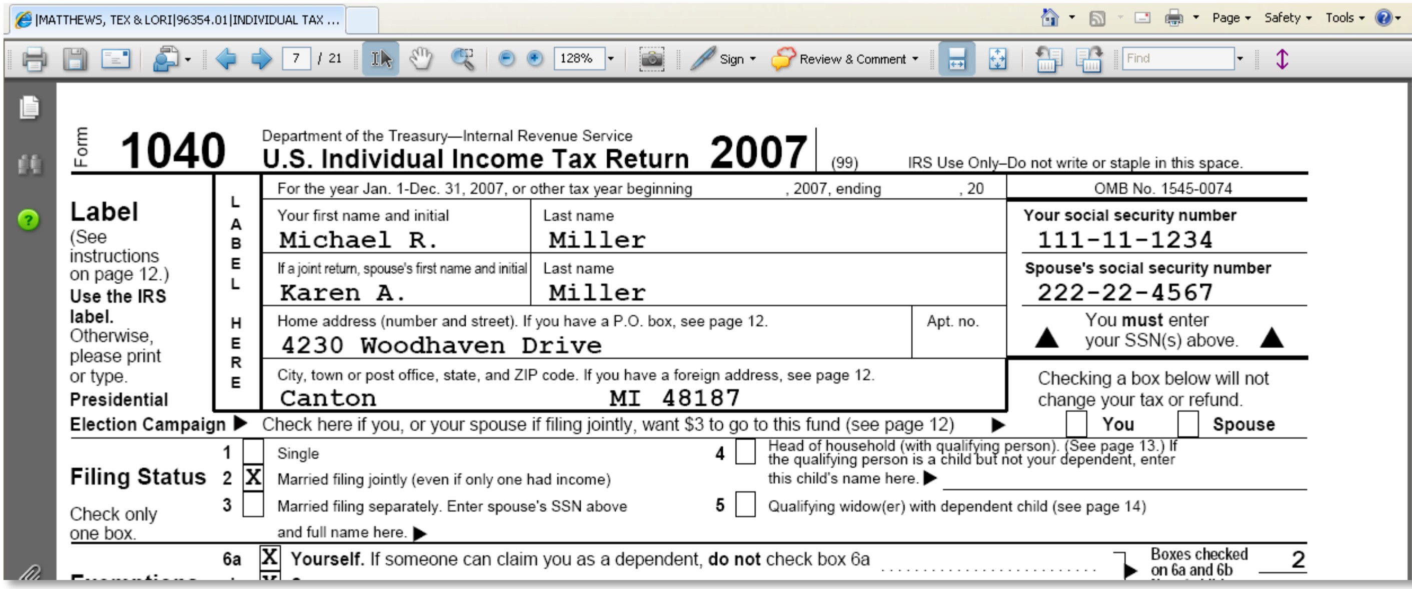
In order to access a document(s) available for your review, click on the Client Flow link. Depending on the number of accounts with the firm and permissions set by the Portal Administrator, one or more client accounts may appear. Click on the desired Client Account. To quickly find a folder, type in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



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:



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



<u>Please note:</u>

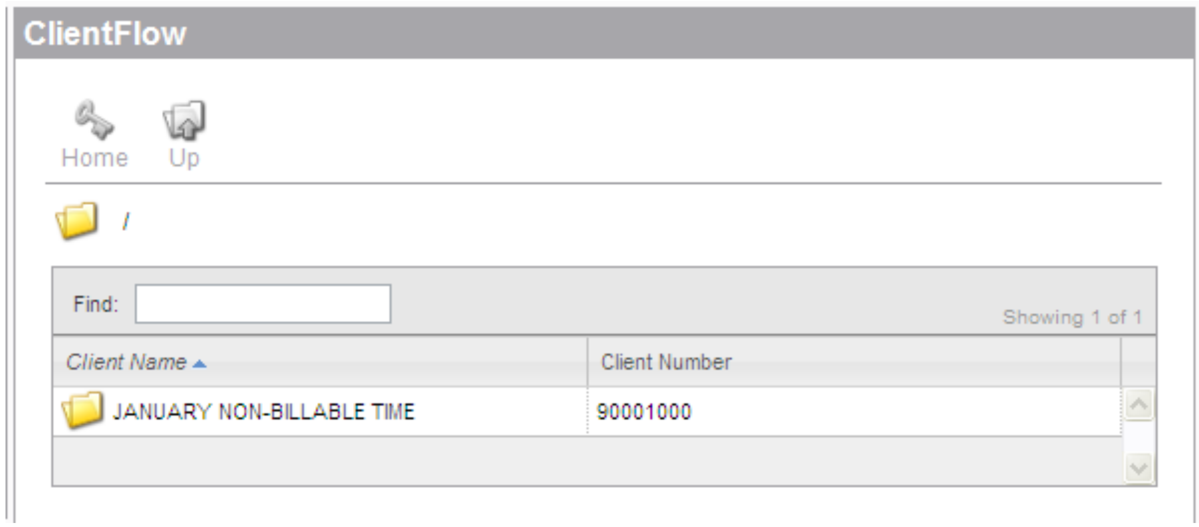
- Documents opened from the Client Portal are READ-ONLY and therefore cannot be edited. If the document requires editing, save a copy to the local drive (File > Save As), edit it as necessary, and then upload it to the Client Portal as a new document.
- Adobe Reader is required at minimum in order to 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.

<u>You can download Adobe Reader by going to www.adobe.com</u>

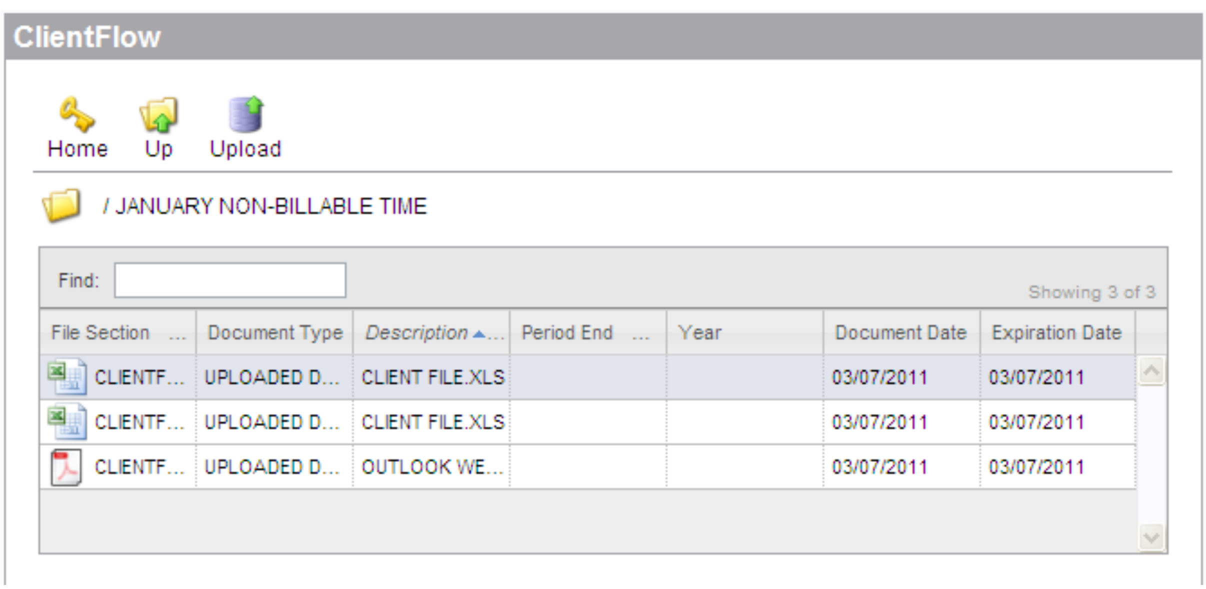
Uploading Documents

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.

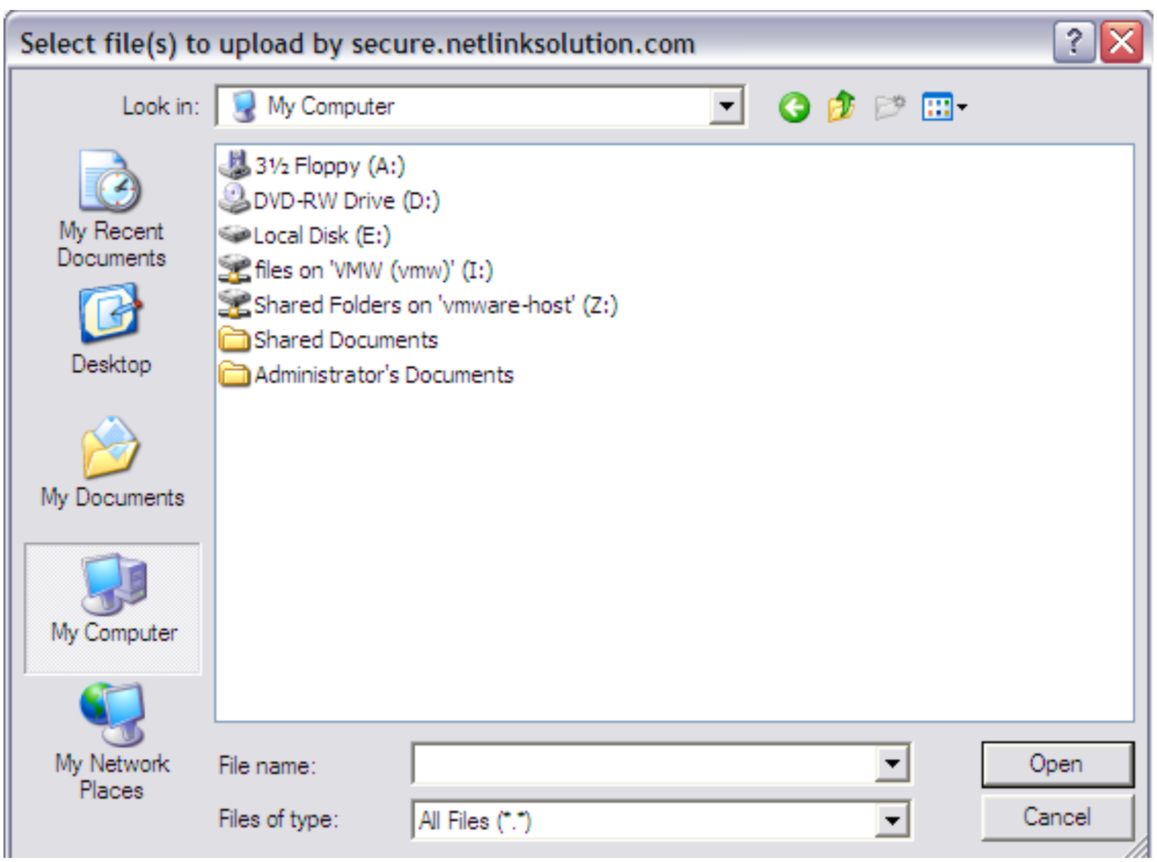
1) Select the appropriate client folder.



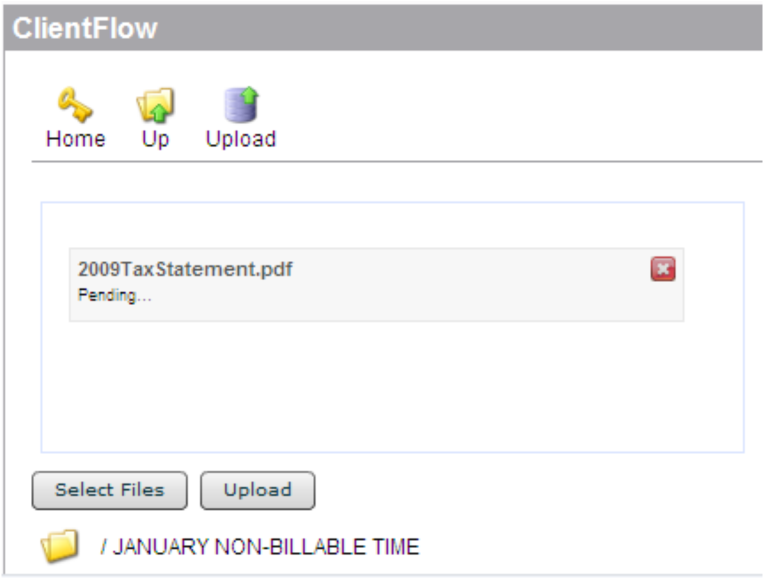
2) Click on the "Upload" option shown below:



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