Tips for using Client Portal

You must have **Adobe Reader version 7.0 or higher** installed to view PDF files.

Home Dashboard

The first screen you are presented when you sign in is the **Home Dashboard**. You can get back to the **Home Dashboard** at any time by clicking the **Home** button which is near the upper-left corner of all screens.

Other buttons always available at the top of all screens are:

1. **Messages** – To the immediate right of the Home button. Allows the viewing of any messages that we might have sent you through your portal.
2. **Your Name** – To the immediate left of the Help button. Clicking on this allows you to:
    a. Edit your account information (Login name, First and Last Name, and Email address)
    b. Update your password
    c. Set your Security Questions
    d. Link another portal account (If you have multiple accounts)
    e. Log Out
3. **Help** – Upper-right corner. Additional tips for using and navigating your client portal.

The **Navigation Pane** is on the left side of the screen with the heading "**NetClient CS**". Clicking on the different links in the **Navigation Pane** controls what is displayed on the screen.

Folder	**Details**
File Exchange	The **File Exchange** link takes you to a screen in which you might find templates that we designed for you and files that you will exchange with our firm. If the navigation pane doesn't include the **File Exchange** link, you don't have access to this area. Contact us if you need this additional functionality.
Other links	Other links under the Documents heading give you access to static documents such as tax returns and financial statements. **Links that are named for the taxpayer** contain personal documents. **Links that are named for companies** contain business documents. If we uploaded a web organizer for you to complete, **a Tax Org indicator** appears to the right of the folder. You can view, download, and print the files that are accessible through these links as often as necessary without having to request mailings or delivery. For example, if you're at a bank meeting to go over a loan application and you forgot to bring a copy of last year's tax return, you can log in to NetClient CS and download or print a copy of the return.

Navigating your folders

Clicking your name will display the folders you can access. For the typical individual client that has been sent a tax organizer, you will see a folder for **Tax Returns** and one for your **Tax Organizer**.

Clicking the **Tax Returns** folder will open up folders for each tax year that has been loaded in your portal (for example, 12-31-14 and 12-31-15). Clicking on a tax year will show an **Action Items** folder and any tax returns for that year. Clicking on a tax return will open the return as a pdf file. The return may open in a different window or tab depending on your browser settings.

Clicking the **Action Items** folder will show any action items that need (or needed) to be completed for that tax year. Click each Action Item to view the pdf document with the instructions on the actions that need to be completed.

There are **icons** immediately below your name and above the folder names:

1. **Home** – Go to Home view of your documents
2. **Up** – Move back up a folder level
3. **Remove** – a folder or document
4. **Download All** – Download all folders and documents to a zip folder
5. **Download Selected** – Download selected folders and documents to a zip file
6. **Refresh** – the current view

Clicking the **Tax Organizer** folder opens your tax organizer. You can also open your tax organizer by clicking on the orange **Tax Org** indicator in the **Navigation Pane**. The **Navigation Pane** now contains the **Tax Organizer Index**. You can use it to open your organizer pages and to upload tax documents. You can enter your information into the organizer using the portal. The icons directly under the Tax Organizer header are:

1. **Send to Preparer** – Click this when you are ready to send your completed organizer to us.
2. **Save & Close** – Click this if you want to save the work that you have entered so far. The next time you open your organizer, it will contain any information you have previously saved.
3. **Create PDF** – This allows you to create a pdf document of your document that you can save to your computer or to print.

The **Uploaded Tax Documents** link in the **Tax Organizer Index** allows you to upload your tax documents. Click the **Upload** icon to upload documents by either dragging files into the dialog box or using the **Add files** button. Click the **Start upload** button once you have added the files you wish to upload.

You can always hit the **Home** button which is near the upper-left corner to exit your organizer without saving it and return to the **Home Dashboard**.

Note: **Your engagement letter** can be found under **Tax Returns** / **12-31-XX** / **Action Items**. Make sure to open the Action Items folder to access the Action Items pdf which is your engagement letter.