



NetClient CS

Portal User Guide

NetClient CS

We are very excited to introduce a powerful new tool that provides you with secure access to your financial information and documents from the convenience of your desk, your home, your bank, or anywhere with an internet connection.

NetClient CS is a web-based portal, similar to online banking or investing, that lets you retrieve your tax organizer and copies of your tax returns, financial statements and more. It's also available 24 hours a day, 7 days a week, so you can access your information wherever you are, whenever you need it.

Roback, Kumlander & Pehl, will also provide you with permission to access a portal document management module called File Exchange. File Exchange is a fast and convenient way to exchange documents and information between you and Roback, Kumlander & Pehl. Unlike emails and their attachments, *NetClient CS* uses encryption technology so you will have confidence knowing that the information is secure when transferred back and forth.

Accessing and Using NetClient CS:

Below are step-by-step instructions on using NetClient CS.

To access NetClient CS, Roback, Kumlander & Pehl, CPAs will create an account for you. You will then receive an email from Roback, Kumlander & Pehl, CPAs, LLP which will contain a link to create a login and register your account. If you do not receive an email, please check your **spam folder**.

From: Roback, Kumlander & Pehl, CPAs, LLP Melissa@rkpcpa.com
To: Client Name
Cc:
Subject: Register your NetClient CS account

Dear Your Name,

Welcome to NetClient CS. Please [Register](#) your account.

After you register your account, you can log in to NetClient CS from our web-site using the link on our home page [Login](#).

Please Note: You may not have files ready to view in your portal. When new files are ready for you to view you will receive an email indicating you have new files in your NetClient CS Portal.

If you need further assistance please feel free to call the office @518-899-5544.

Thank you for using NetClient CS.

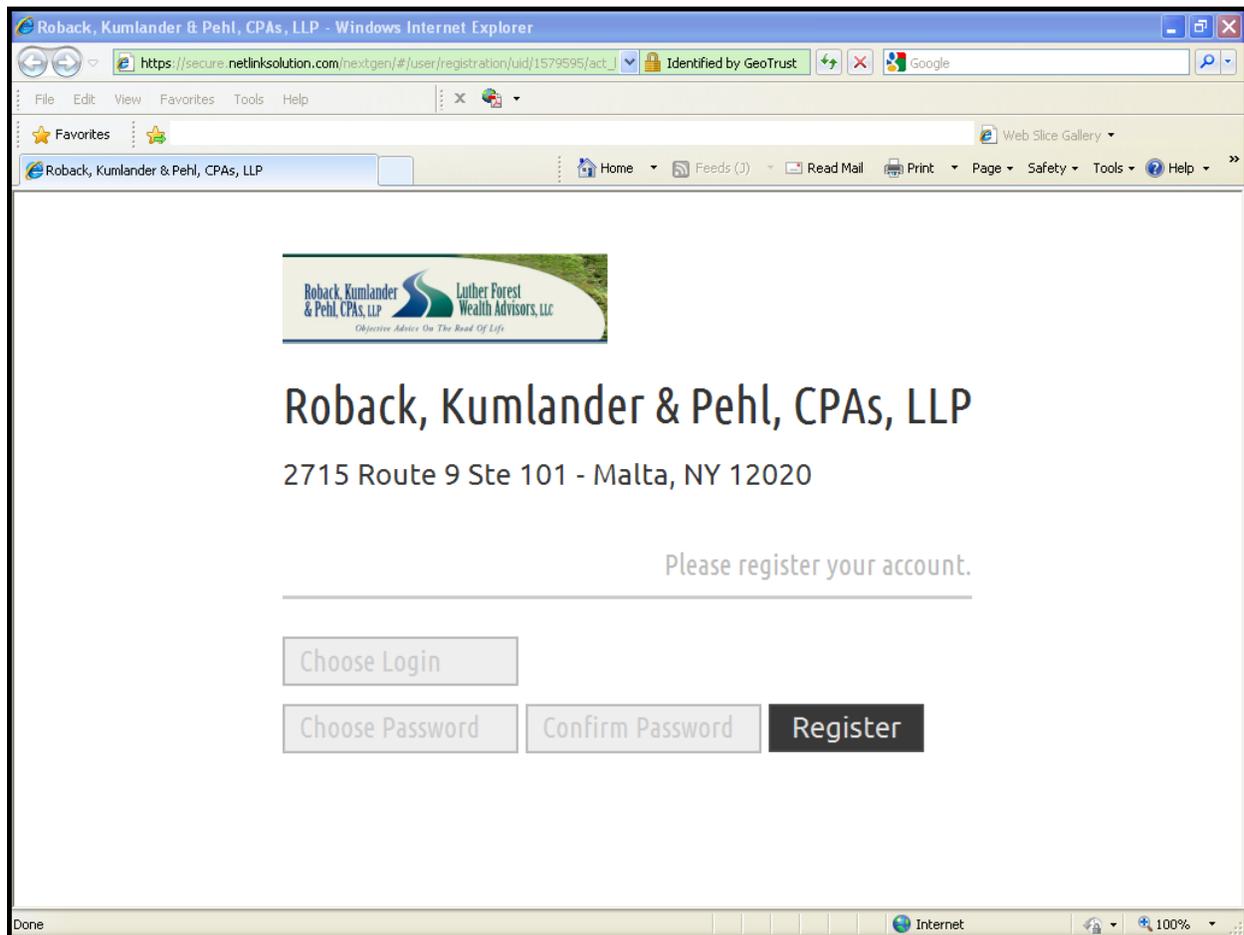
Melissa Benidt

Roback, Kumlander & Pehl, CPAs, LLP
2715 Route 9 Ste 101
Malta, NY, 12020

This electronic mail message contains confidential and legally privileged information intended only for the recipient. If the reader of this message is not the intended recipient, the reader is hereby notified that any dissemination, distribution, copying or other use of this message is strictly prohibited.

Once the email has been received, click on the link to go to the registration website and follow these steps:

1. Enter your email address in the Choose Login field
2. Enter a password in the Enter Choose Password field
3. Re-enter the password in the Confirm Password field

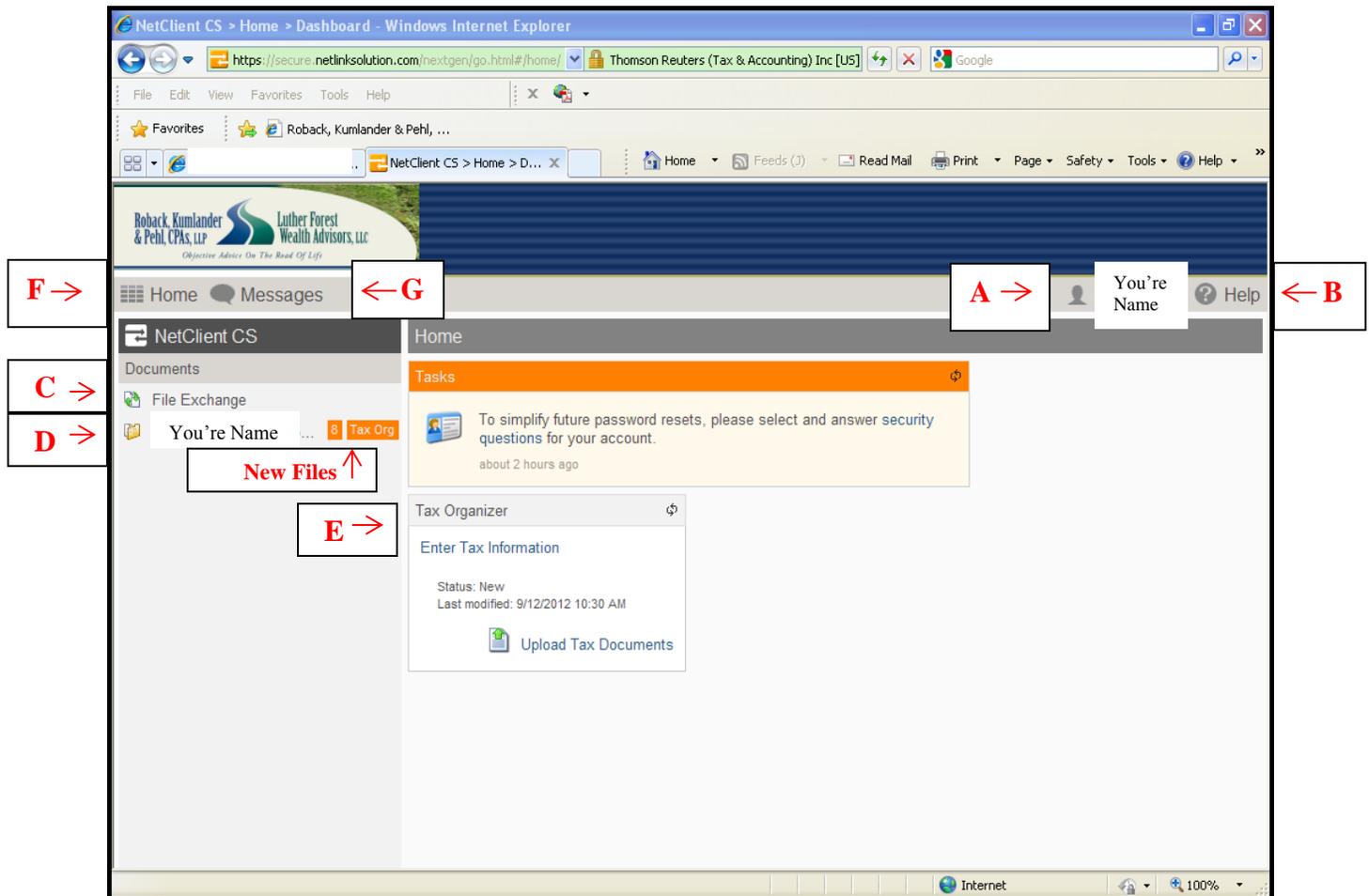


Important Information about your Login and Password:

1. The password must be at least seven (7) characters long and must include letters and numbers. You can also use symbols.
2. Passwords are case sensitive (e.g., PassWord1).
3. Users will be required to change their password every 90 days for security purposes. Passwords cannot be reused for 9 cycles.
4. If you forget your password, Click; ***Can't access your account?*** And a new temporary password will be sent to your email address on file. If ten consecutive, unsuccessful attempts are made to log in to an account, the login for that account is locked. An email message will be sent automatically to the email address assigned to the login; the email message notifies the user and provides a link to unlock the login immediately. The lock will expire after 30 minutes.

Note: For future access, login to the Roback, Kumlander & Pehl Client Portal (NetClient CS) by visiting our website, www.rkpcpa.com and clicking on the NetClient CS Login located on our homepage.

After logging in, the NetClient CS Home page will be displayed listing File Exchange and your personal document folders.



- A. Your Account** – Allows a user to Edit Account, Update password, Set Security Questions and Log Out.
- B. Help Menu** – Provides a menu of help topics for using NetClient CS.
- C. File Exchange** – In File Exchange you will have access to a folder called Tax Information. This folder allows users to view files that we have added for the client and allows clients to add files for Roback, Kumlander & Pehl, CPAs to safely view.

D. Client Folder - In your client folder we will provide you with secure, static PDF files that you can view, download, and print. For example, we will deliver electronic copies of documents, such as tax returns, financial statements, and payroll reports, in a secure environment without jeopardizing privacy. You will see an alert to the right of your name indicating you have **new files**. Click on any document in the list to open the document in view mode (i.e., read-only mode). Once you have opened a document, you may print it, save it to your hard drive or email the documents to a third party.

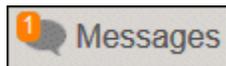
E. Tax Organizer - Is the electronic version of the paper Client Organizer we currently mail to our clients. The Electronic Tax Organizer allows us to send your private organizer to your NetClient CS web portal. You have the ability to enter new data in screens, complete the organizer questionnaire, include notes and questions for us, attach files, create screens for new activities (such as W-2s), and then send the electronic organizer to us through the web portal. Look for your New 2012 Tax Organizer sometime in early January 2013 along with detailed instructions.

Note: No documents will appear in a Folder if Roback, Kumlander & Pehl, CPAs, LLP have not published any documents to NetClient CS for you to view, or you have not recently uploaded any documents. Tax Organizers will be available every January for the new tax filing year.

F. Home - Allows a user to return back to the Home view of the Dashboard to view all applications.

G. Message - You will receive notifications when certain events occur.

When NetClient CS adds a notification to the Messages menu, it also adds an alert



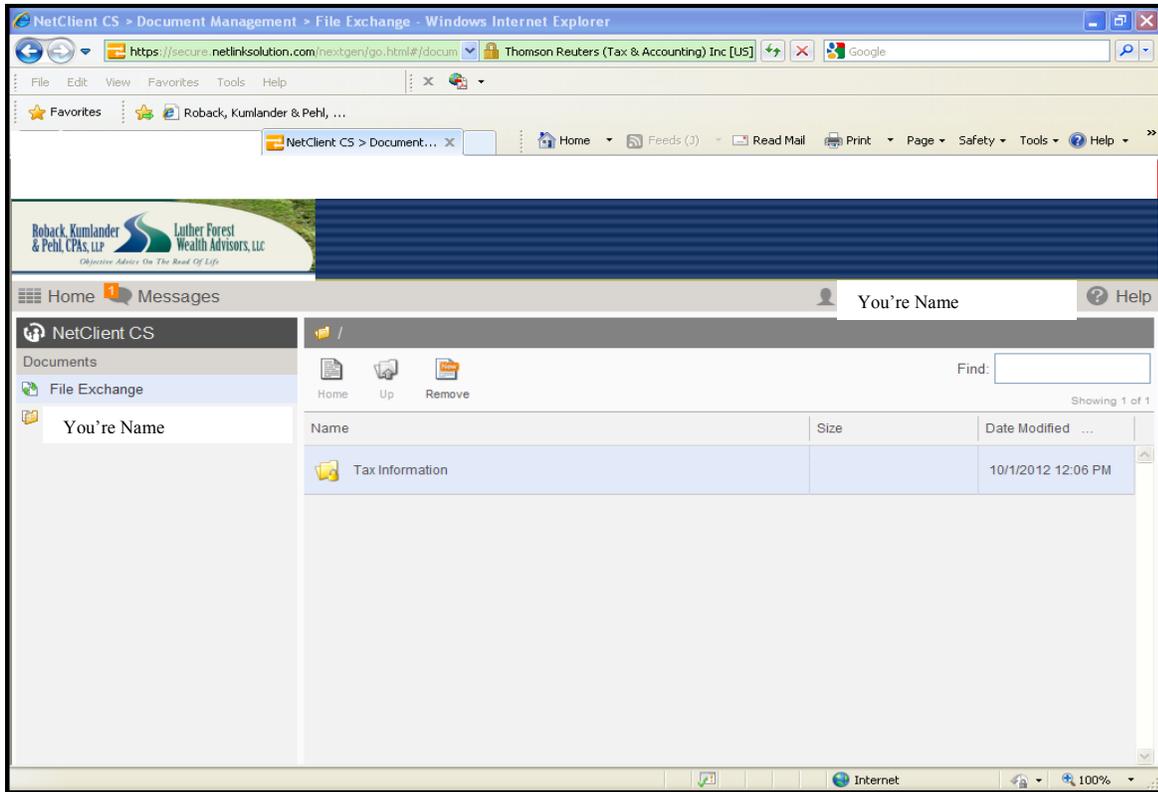
so you can easily see that notifications are waiting for you.

To view the messages, follow these steps.

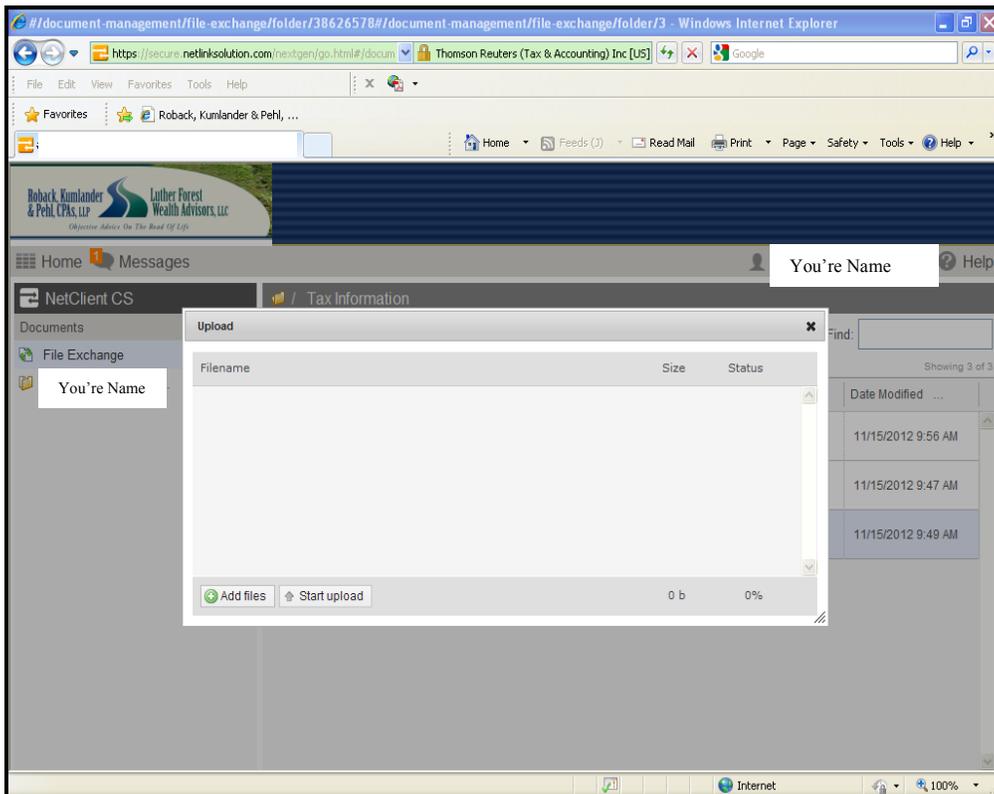
1. Click the Messages menu and choose View All Messages.

When you view a message, NetClient CS marks the message as read. The message is still available from the Messages menu, but the alert no longer appears to the left of the Messages menu.

Uploading Files to File Exchange:



1. In the File Exchange screen, click the Tax Information folder to upload the file.



Note: You can upload multiple documents at the same time. If you do not want to upload a document, click the **X** in the right hand corner of the Upload screen to close the Upload screen.

3. **Do one of the following.**
 - Click the Add files button, navigate to the files you want to upload, select them, and click the Open button.
 - If your internet browser supports HTML 5, the words "Drag files here" appear in the upload section. You can upload files by opening Windows Explorer, navigating to the files you want to upload, selecting the files, and dragging the files to the file list.
4. Click the Start upload button
5. If you uploaded all requested files to your Tax Information folder. **NetClient CS will notify us that you uploaded the requested files.**

With all the documents selected for uploading, click the Start upload. After your documents are finished uploading to File Exchange, you will see them in the folder you uploaded them to.

If you want to remove a document from being uploaded, you can select the document and click the Remove button.

FREQUENTLY ASKED QUESTIONS:

What is a portal?

A portal is a private doorway to information. NetClient CS portals are password-protected, secure areas on the Internet accessible to you via our website. Think of NetClient CS as a private online office that only you and we can enter.

What types of files can I exchange with you?

You can exchange any type of file! You can exchange Microsoft Office files, budget templates, and forecasting documents with no faxing, postage, or courier costs – all in a secure environment.

How do I access my account information?

It's easy:

1. Visit our website at www.rkpcpa.com
2. Click on the NetClient CS Login on the main page.
3. Login using your personalized ID and password.
4. Use any or all of the available online services we have personalized for you.

When and how often can I access my account information?

You can access your account as often as you like – any time of the day or night, any day of the week, from any place where you have an Internet connection.

Do I need a password?

Yes. Once you sign up to use NetClient CS, you'll create your own private ID and password.

What do I do if I forgot my password?

Click on the “forgot your password” link and we'll e-mail it to you promptly.

Is NetClient CS secure?

Absolutely! Your software and data are in the most secure location available. The data center takes every precaution to guarantee the safety and integrity of your data.