



Client Portal User Guide

As your accounting firm, Crippen & Co. is honored to have earned your trust and we take that responsibility very seriously. We understand and value the importance you place on your security/privacy and we go to great measure to help you feel secure and confident in the handling of your financial data.

To better serve you, we have implemented a portal system designed and hosted by Thomson Reuters, known as NetClient CS. This guide is designed for our clients who will have access to the Document Presentation and File Exchange modules in NetClient CS. The portal is an extension of Crippen & Co.'s website and provides a solution for our clients to exchange electronic documents securely and quickly. It will also provide you with 24/7 access to electronic copies of your financial documents such as tax returns and financial statements.

When you use NetClient CS, be assured that your software and data are in the most secure location available—a class-IV, IBM-certified data center, which takes every precaution to guarantee the safety and integrity of your data.

System Requirements

To use NetClient CS, you must have a high-speed internet connection that is compatible with the following internet browsers:

- Google Chrome
- Internet Explorer version 7.0 (or higher)
- Mozilla Firefox version 3.0 (or higher)
- Safari version 5.0 (or higher)

Access & Use of NetClient CS

This Client Portal User Guide will provide step-by-step instructions for registering with NetClient CS and using the Document Presentation and File Exchange modules.

Please Note:

The images used in these instructions are for illustrative purposes only and could be slightly different than the actual NetClient CS website you will access.

To access NetClient CS, Crippen & Co. will create an account for you. You will then receive a registration e-mail from register@netclients.com.

Please Note:

It is very important that you actively look for this e-mail, as your e-mail program may treat this e-mail as spam or junk mail.

Sample NetClient CS Activation E-mail

- Once you receive the e-mail, go to the registration website by clicking the “Register” link in the e-mail.

Dear
Welcome to NetClient CS. Please **Register** your account.
After you register your account, you can log in from the NetClient CS [Login](#) page.

Thank you for using NetClient CS.

Crippen & Co.
1900 SE 18th Ave
Ocala, FL 34471

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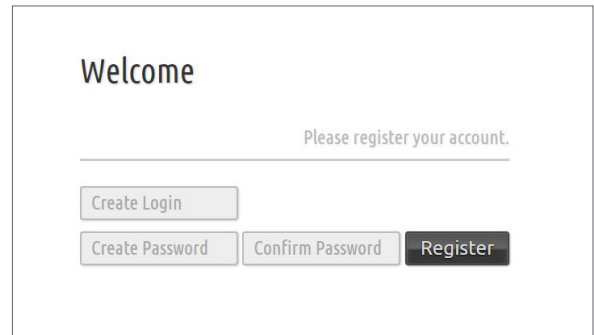
Client Portal User Guide

Sample NetClient CS Registration Screen

- Enter your e-mail address as your user login.
- Enter a password in the “Create Password” field and enter it again in the “Confirm Password” field.
- Click “Register”

Please Note:

The password must be at least 7 characters long and is case-sensitive. It must include letters and numbers (e.g. password1) and you may include symbols (e.g. \$, %, #).

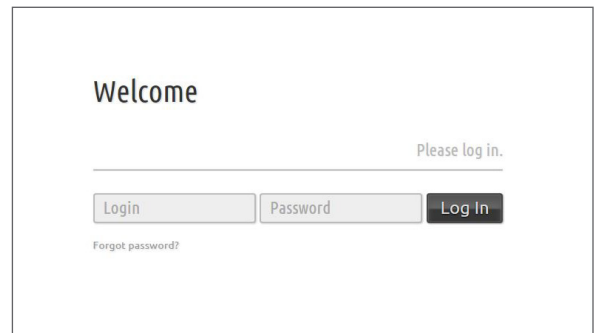


Sample of Successful Registration & Login Screen

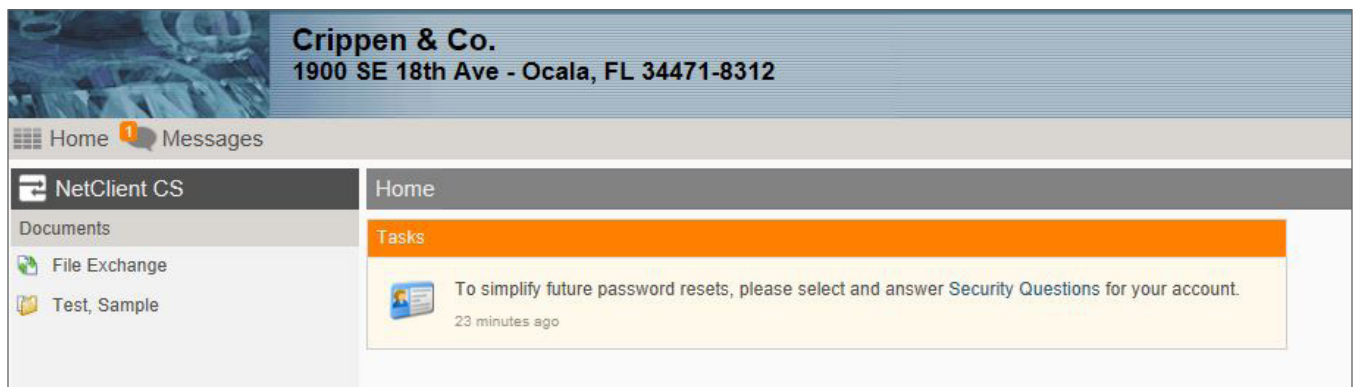
- To confirm a successful registration, enter your login (e-mail address) and password created previously to access your portal.
- If you forgot your password, you can request to have a temporary password e-mailed to you by clicking on the link “Forgot Password?”

Please Note:

For future access and to login to your NetClient CS after the initial login, visit our website www.CrippenCPA.com and then click on the “Client Portal Login” from the home page.



Sample of Home Screen in the Client Portal





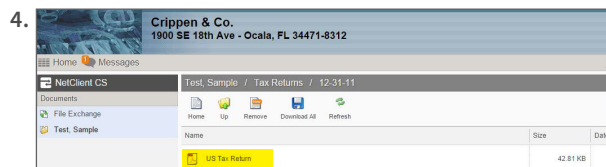
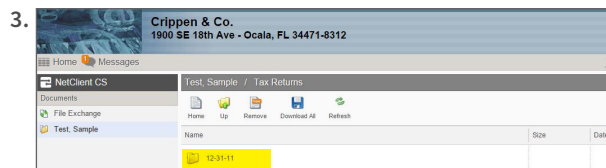
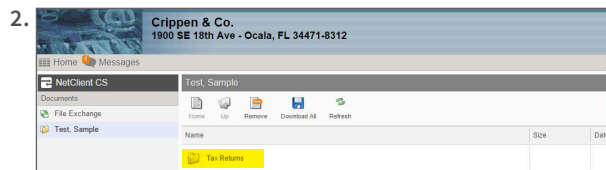
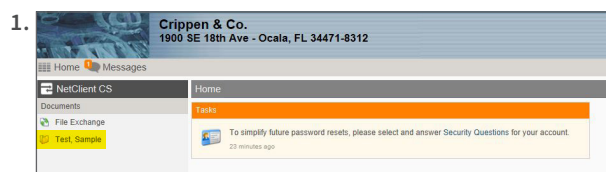
Client Portal User Guide

Document Presentation

1. To access your tax documents click on the folder “Test, Sample” (in this example) on the left hand side of the home screen under NetClient CS – Documents.
2. Click on the folder in the body of the document titled “Tax Returns.”
3. Click on the folder for the year-end in which you want to view the tax return (“12-31-11” in this example).
4. Click on the PDF document titled “US Tax Return.” Depending on your internet browser, the PDF will either 1) download to your computer for you to access, or 2) open inside the web browser to view. Either way, you are able to save the PDF directly to your computer.

Please Note:

- Adobe Reader is required in order to review 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 on your computer in order for you to view the document.
- Download the latest version of Adobe Reader by going to <http://get.adobe.com/reader/>





Client Portal User Guide

File Exchange

1. From time-to-time, Crippen & Co. may exchange files with our clients. These files can be downloaded and uploaded through the NetClient CS portal. To access, click on the “File Exchange” link on the left-hand side of the home screen. You and Crippen & Co. will be notified via e-mail when a document has been downloaded and/or uploaded to your portal.
2. The “Source Documents” folder is where documents sent by Crippen & Co. and documents sent by you should be maintained. You can download and upload documents from this location.
3. To download and save all documents at once, click “Download All” and depending on your web browser, you should receive notification on where to save the document. The system will download them as a .zip folder.

Please Note:

- You must extract the documents from the zip folder before you can access them.
 - To save and/or review a document one at a time, simply click that document and save directly from the application.
4. To upload a document, click “Upload” then choose “Add Files”
Choose the location on your computer where the document is located and select it. Once the document is populated in the upload screen, click “Start Upload.”

We hope this Client User Portal Guide has been helpful. Please contact our office at 352.732.4260 or Mail@CrippenCPA.com if you have further questions or concerns.

