



Boeckermann Grafstrom Mayer

Introduction to NetClient CS Portal

This Guide is designed for users who will have access the NetClient CS portal. The NetClient CS portal provides a solution for you and BGM to share and exchange electronic files securely and quickly. It also allows a reduction in environmental waste by corresponding electronically instead of handling paper (e.g., less use of paper and less vehicle emissions to have files delivered). Unlike emails and their attachments, the NetClient CS portal uses encryption technology so you and will have confidence knowing that the information is secure when transferred back and forth.

There are two sections to the NetClient CS portal: ClientFlow and File Exchange. The ClientFlow and File Exchange sections are explained below with instructions.

System Requirements for using the NetClient CS Portal

To access and use the NetClient CS portal, you need high-speed internet access. Also, NetClient CS recommends the use of a web browser with a minimum of 128-bit encryption.

For more detailed system requirements, please visit the website below for the latest requirements:

<http://cs.thomsonreuters.com/support/reference/sysinfo.aspx>

Accessing NetClient CS Portal

To access NetClient CS, BGM will create an account for you. You will then receive a notification email **directly from register@netclientcs.com** which will contain a link (or URL address to copy and paste into the browser) to create a login and register your account. If you do not receive an email, please check your spam folder and then contact BGM (see contact info at the end of this document).

1. Once the email has been received go to the registration website and follow these steps:
 - a. Enter your email address in the Create Login field
 - b. Enter a password in the Enter Password field
 - c. Re-enter the password in the Confirm Password field

Important Information about your Login and Password:

- The password must be at least seven (7) characters long and must include letters and numbers. You can also use symbols.
- Passwords are case sensitive.

Note: If you have any questions or issues with accessing your NetClient CS user account, contact BGM (see contact info at the end of this document).

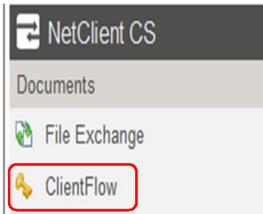
Note: For future access to login to NetClient CS after your initial login, visit BGM's website (www.bgm-cpa.com) to link to the site, or save the site as a Favorite in your browser.

2. After successfully registering your NetClient CS account, confirm that your email address is in the Login field and enter the password that you just created and click on the Login button.

Using ClientFlow

The ClientFlow section of the NetClient CS portal is generally used for BGM to securely allow you access to your prior year returns or other documents that may be requested by financial institutions. You may also use it to upload files to BGM. Common file types that are uploaded through ClientFlow have the following extensions: pdf, xls, xlsx, doc & docx. The ClientFlow section can be used to upload your tax organizer with tax supporting documents (W2, 1099s, etc). Below are instructions on how to use the ClientFlow section of the NetClient CS portal:

1. On the left side under the NetClient CS menu click on ClientFlow.



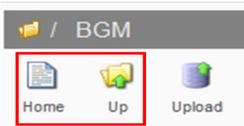
2. Click on folder that is associated with the Client Name.

Name	Size	Date Modified
 01000 BGM		11/14/2010 11:

3. Click on any file to view the file.

Note: Files opened from ClientFlow are READ-ONLY and therefore cannot be edited and saved back to ClientFlow. If the file requires editing, save a copy to the local drive, edit it as necessary, and then upload it back to ClientFlow (uploading is discussed in the next steps).

4. Click on HOME or UP icons to return back to the list of Client Name folders.



5. Click on folder that is associated with the Client Name.

Name	Size	Date Modified
 01000 BGM		11/14/2010 11:

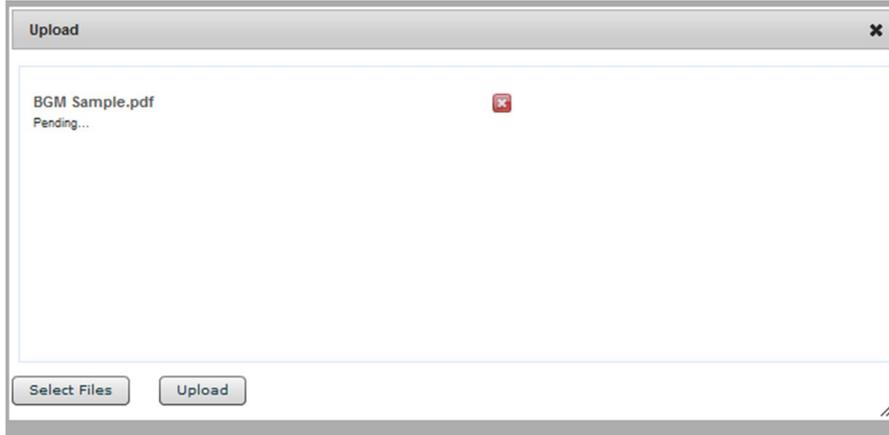
6. Click on Upload to upload a file to ClientFlow.



7. Click on the Select Files button to search for the file to upload.



- In the Choose file window, select the file to upload and click on the Open button. The file will show up in the Upload window as pending.



- Click on the Upload button to upload the file to ClientFlow.



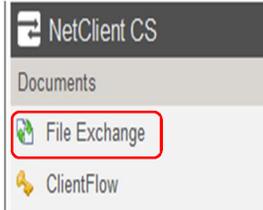
Note: BGM WILL NOT be automatically notified when a you upload a file to NetClient CS. Please contact your accountant anytime you upload a file to NetClient CS.

- After viewing or uploading files, click on Sign Out to end your session.

Using File Exchange

The File Exchange section of the NetClient CS portal is generally used to transfer backup files of QuickBooks, Peachtree and other accounting applications that can't be transferred through the ClientFlow section. Below are instructions on how to use the File Exchange section of the NetClient CS portal:

1. Under Document Management click on File Exchange to open the application.

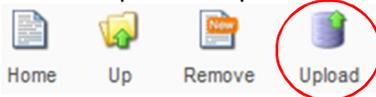


2. Click on folder that is associated with the Client Name.

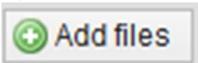
Name	Size	Date Modified
 01000 BGM		11/14/2010 11:

3. Click on any file to view the file. You will be prompted to Open or Save the file.

4. Click on Upload to upload a file to File Exchange.



5. Click on the Add files button and browse for the location of the files to upload. Highlight file(s) to upload and click Open. You can select multiple files at a time.



6. The selected file(s) will show up in the upload window. Click on the Start upload button to upload the file(s) to File Exchange.



7. Once the files are uploaded all the files will appear in the folder and an email will be sent to the accountant you are working with to notify them that files were uploaded.
8. After uploading your files, click on Sign Out to end your session.

Contact Information for Support of NetClient CS

Contact: Andrew Benedict or Tricia Swanson

Phone: 952-844-2500

Email: portalsupport@bgm-cpa.com

Web Site: www.bgm-cpa.com