

Client Portal  
NetClient CS

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Introduction Guide

## Introduction to NetClient CS

This Guide is designed for a CPA Firm's clients who will have access to the document management module in the NetClient CS portal. The NetClient CS portal is an extension of our website and provides a solution for us to share and exchange electronic documents 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 documents delivered). Unlike emails and their attachments, the NetClient CS portal uses encryption technology so you will have confidence knowing that the information is secure when transferred back and forth.

We will grant you permission to access a portal document management module – primarily **ClientFlow** but also **File Exchange** (FileExchange is not currently enabled. PKF will alert you when this feature has been activated.). ClientFlow interacts directly with our document management system, which allows for a fast and convenient exchange of documents and information. File Exchange is also a fast and convenient way to exchange documents and information between us, and has additional features that you can use. **We will conduct the information exchange primarily through ClientFlow, and your client service team will let you know when File Exchange should be used.**

## System Requirements for using the Document Management Module in the NetClient CS Portal

To access and use the NetClient CS portal, you need high-speed internet access.

- Apple Safari version 5.0 or higher
- Google Chrome
- Microsoft Internet Explorer version 7.0 or higher
- Mozilla Firefox version 3.0 or higher

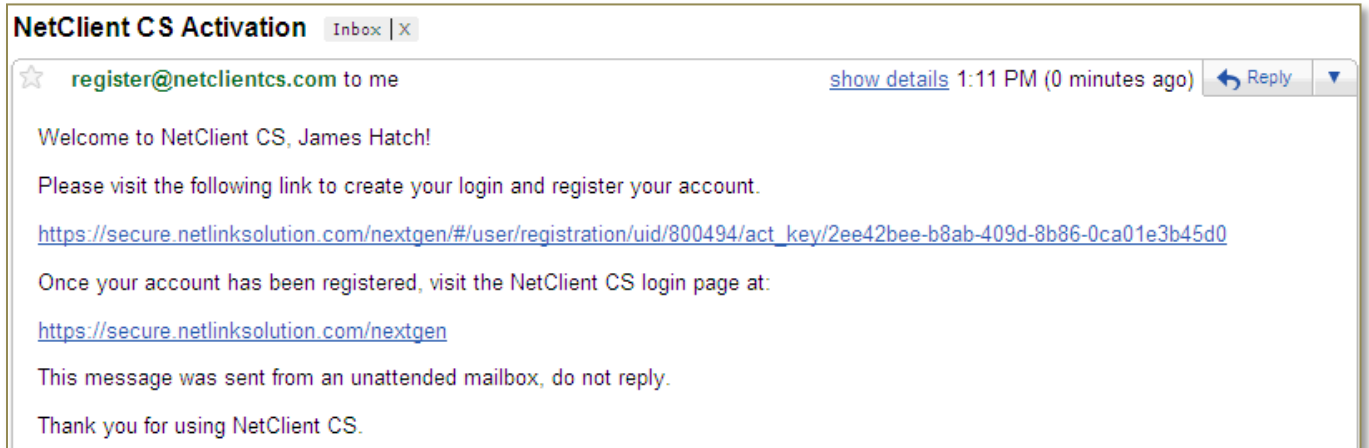
**For more information on these system requirements or assistance with meeting these requirements, please contact us.**

## Accessing and Using NetClient CS

Below are step-by-step instructions on using NetClient CS, and the two document management modules: **ClientFlow** and **File Exchange** (not yet enabled). The images used in these instructions are for illustrative purposes only and will be slightly different than the actual NetClient CS website you will access.

To access NetClient CS, we will create an account for you. You will then receive a registration email from [register@netclientcs.com](mailto:register@netclientcs.com). **It is very important that you actively look for this email, as your email program may treat this email as a spam or junk email.** In the email, it will contain a link (or URL address to copy and paste into the browser) that will take you to a page to create a login and register your account. If you cannot locate the registration email then contact the firm and they can resend the registration email.

## Sample NetClient Activation Email:



1. Once the email has been received go to the registration website and follow these steps:
  - a. Enter a login in the Create Login field (Note: login should be an email address)
  - b. Enter a password in the Enter Password field (see password requirements below)
  - c. Re-enter the password in the Confirm Password field

The screenshot shows a registration window titled "NETCLIENT CS™" with the subtitle "Register Your Account". The form contains three input fields:

- Create Login:
- Enter Password:
- Confirm Password:

At the bottom left, the version number "2009.3.0.C" is displayed. At the bottom right, there is an "OK" button.

## Important Information about your Login and Password

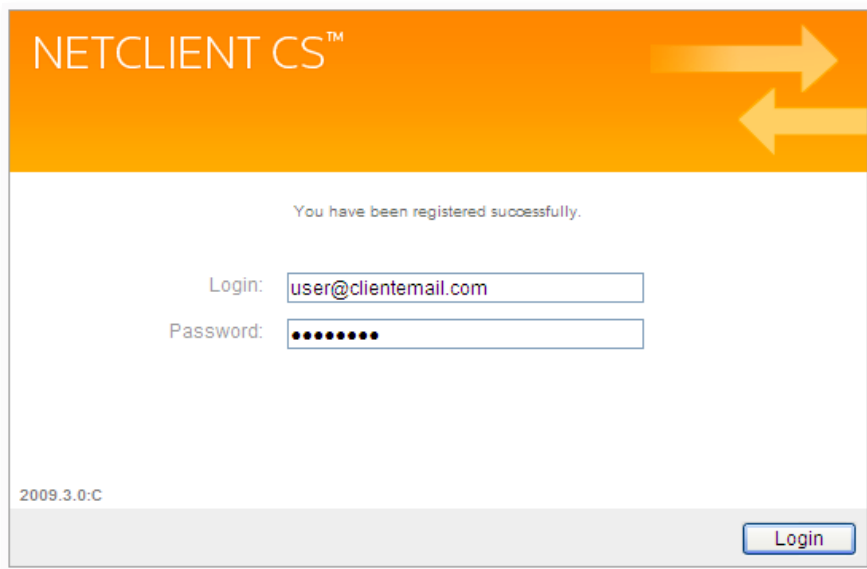
- The password must be at least seven (7) characters long and must include letters and numbers (e.g. **password1**). You can also use symbols (e.g., %, \$, #)
- Passwords are case sensitive (e.g. **PassWord1**)
- Users will be required to change their Passwords every 90 days for security purposes. Passwords cannot be reused for 9 cycles.

- If you forgot your password, you can request to have a new temporary password emailed to you.
- 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 of the unsuccessful login attempts and provides a link to unlock the login immediately. The account will be unlocked when the user clicks the link within the email message or when the lock expires after 30 minutes.

**Note:** If you have any questions or issues with accessing your NetClient CS user account, please contact us.

**Note:** For future access and to login to NetClient CS after this initial login, visit the PKF Texas' website ([www.pkftexas.com](http://www.pkftexas.com)) for a login button.

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



NETCLIENT CS™

You have been registered successfully.

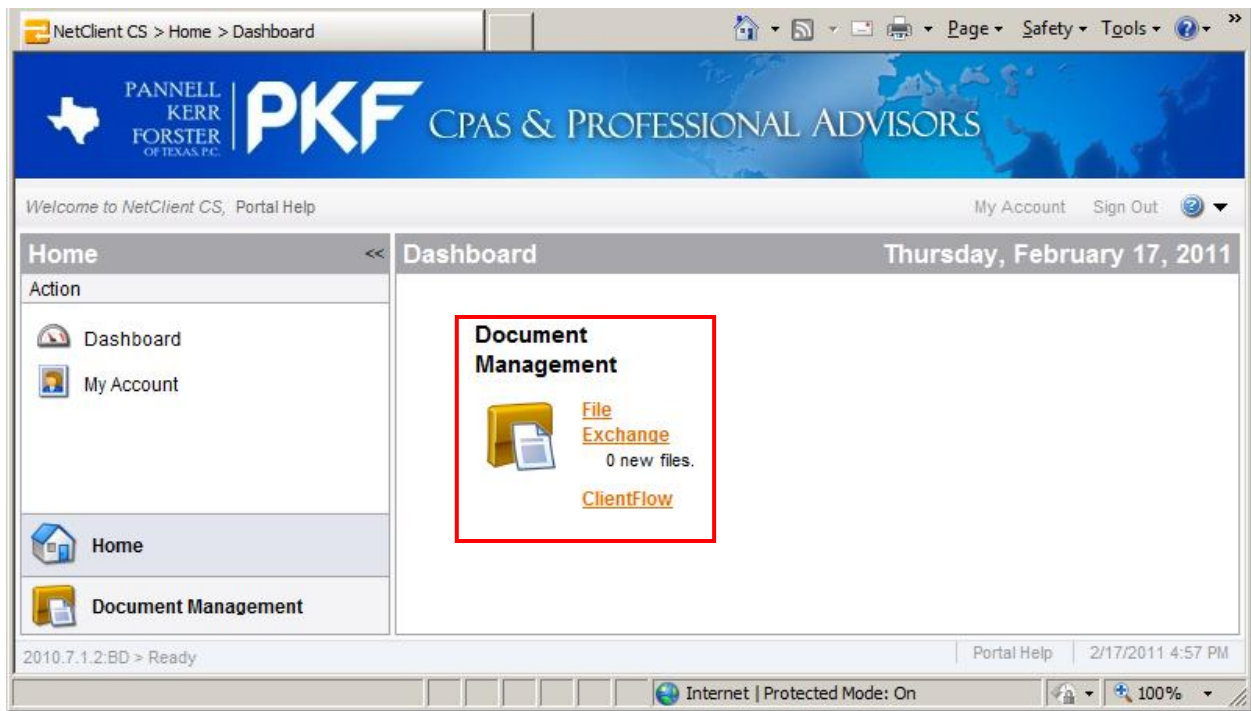
Login:

Password:

2009.3.0:C

Login

**Note:** After logging in, the NetClient CS Home or Dashboard page will be displayed listing Document Management and the ClientFlow and/or File Exchange modules. Also, Security Questions can be setup to simplify password resets if you should forget your password.



## Access the Client Portal

To access the client portal from our website, [www.pkftexas.com](http://www.pkftexas.com):

- Open your browser
- In the Address bar type [www.pkftexas.com](http://www.pkftexas.com) and press enter.
- In the upper right area of the screen, click the Client Portal link
- Enter your e-mail address and password and click Login

For assistance or feedback, please contact your tax representative or contact [portalhelp@pkftexas.com](mailto:portalhelp@pkftexas.com).