

Upload Document to the PKF Texas Client Portal Video Transcript

Welcome to the PKF Texas instructional video for the NetClientCS Client Portal. In this video, we will show you how to upload documents using NetClientCS.

PKF Texas is pleased to introduce to you our next generation client portal solution. The client portal is a secure website where you can:

- Download your sensitive tax and accounting documents
- Send us required supporting documents
- and safely store documents with us.

All you need is:

- a reliable internet connection
- a web browser
- Adobe Acrobat Reader
- the email address you used to register
- and your NetClientCS password

To access the client portal from our website, www.pkftexas.com

- Open your browser
- In the address bar, type www.pkftexas.com and press enter.

In the upper right area of the screen, click the "Client Portal" link. You will see a login box.

- Enter your login and password
- Click the login button.

The portal opens up to your "Home Dashboard".

To access and upload your documents:

- Click the ClientFlow link under Document Management

Clients with multiple entities will see a folder for each entity.

- Click the entity folder you would like the document to be uploaded to. You will be presented with a list of the documents that have been published to that folder.
- Click the Upload button above the documents.
- Click the Browse button.
- Locate the file on your computer that you would like to upload.
- Type a description into the description field
- Click the Upload button
- The file should now appear in the document list.
- Repeat this process for each document you would like to upload.

When you are finished with your session, click Sign Out in upper right area of the screen.

We hope you find our next generation client portal system to be a secure, flexible, and easy way to access your important files and conduct business with us.

For assistance or feedback, please contact portalhelp@pkftexas.com.

A transcript of this presentation and the client portal User Guide in PDF format are available on our website, www.pkftexas.com/ClientPortal/.