

steven zelin, cpa  
*certified public accountant*

# NetClient CS<sup>®</sup> Steven Zelin, CPA Client Portal User Guide

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# Introduction to Your Portal

Here at Steven Zelin, CPA, we've implemented NetClient CS, our Client Portal, which offers you a secure, convenient way to access documents and exchange information anytime and anywhere. This portal will allow you 24/7 access to all your confidential information, such as tax returns, important documents, and financial statements, as well as give you the ability to send (via upload) your files and documents to us.

We live in a time where data security is of the utmost importance. Transferring documents containing sensitive information via e-mail is no longer safe or viable. We understand how crucial it is to keep client files completely secure. The Steven Zelin, CPA Client Portal will allow us to do just that, by using encryption technology to ensure that your information is secure. Think of the Steven Zelin, CPA Client Portal as an extension of our website, through which we can securely and quickly exchange electronic documents with you and deliver electronic documents to you.

This guide will walk you through all the information you will need to use your Steven Zelin, CPA Client Portal. Through your portal, you will have access to File Exchange, which provides a fast and convenient way to exchange documents, and a tax organizer which interacts directly with our document-management applications.

## System Requirements

You must have a high-speed internet connection to use our NetClient CS Portal. NetClient CS is compatible with the following internet browsers:

- Google Chrome™
- Microsoft® Internet Explorer® version 8.0 or higher
- Mozilla® Firefox® version 3.0 or higher

For more information about system requirements, please feel free to contact us at (646) 678-4496.

## Getting Started with Netclient CS

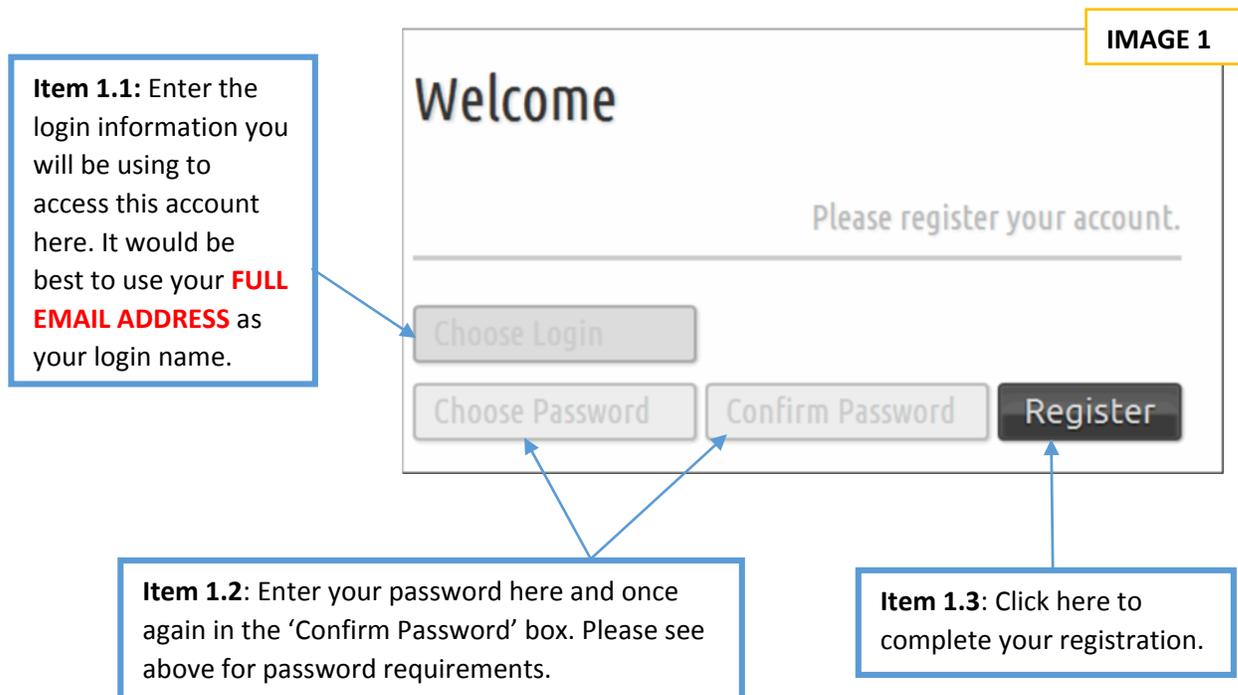
Below, we have provided step-by-step instructions and images to walk you through some of the enabled features. Please note that these images are examples, and depending on the features we enabled for you, your portal may look slightly different.

## Activating & Accessing the Client Portal

By now, you should have received an activation email message from **steven.zelin@thesingingcpa.com** with the subject **2015 Tax Organizer** or **Please register your Client Portal account**. The message will contain a link through which you can create a login and password for your NetClient CS portal.

Follow these steps to activate your NetClient CS account:

1. In the activation email message, click the [Register](#) link to create your login and register your account. Please contact us if you have not received an activation email message. It is very important that you actively look for this email, as it may have ended up in your spam or junk folders.
2. Once you click [Register](#), you will be redirected to the registration screen, where you will enter a login in the **Choose Login** field. It would be best to use your full email address as the login name. [See Item 1.1]
3. Enter a password of your choice in the **Choose Password** field, and re-enter the password in the Confirm Password field. [See Item 1.2] Password requirements are as follows:
  - Passwords **must** contain at least seven characters, and they must include both letters and numbers (for example: password2).
  - Passwords can contain symbols, such as %, \$, and #.
  - Passwords **are** case sensitive (for example: PassWord2).
4. Click the **Register** button to complete registration. [See Item 1.3]



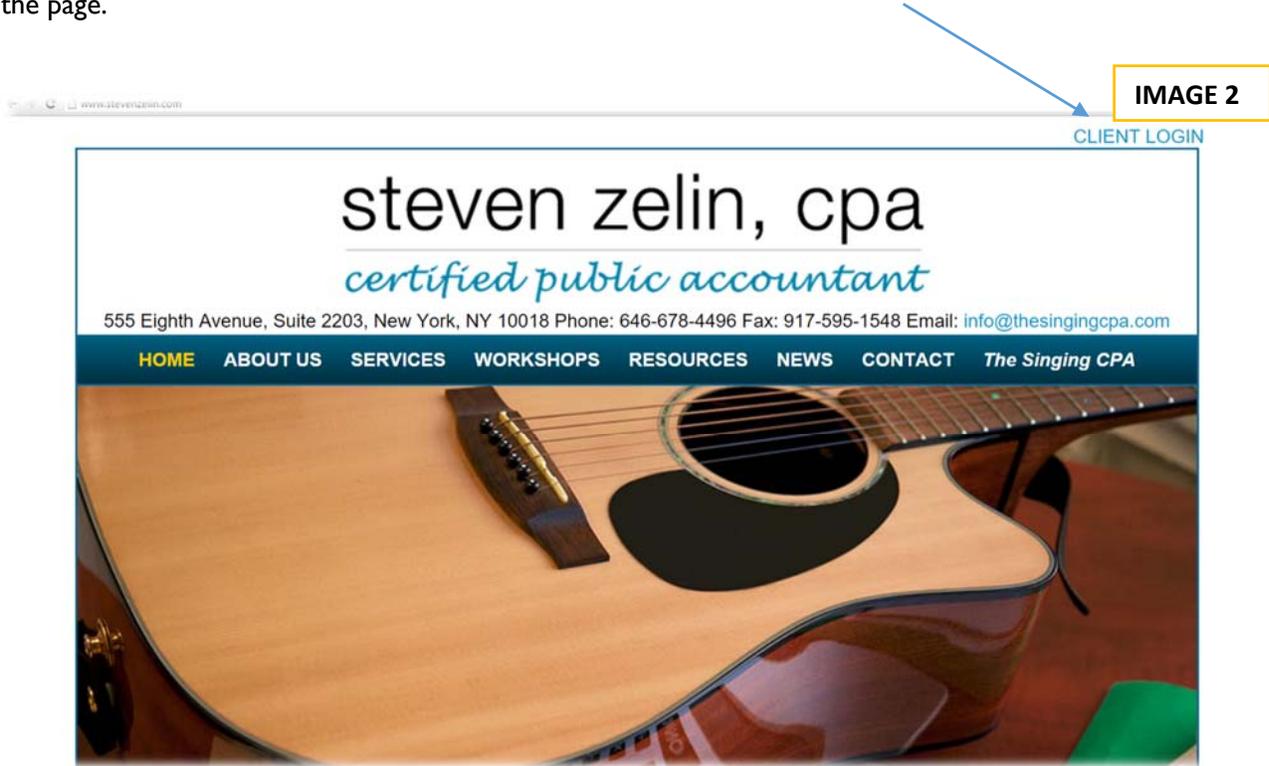
## Login, Password, and other Additional Information

- **Accessing your portal:** After registering your account, you can log in to NetClient CS from our website by going to [www.stevenzelin.com](http://www.stevenzelin.com) and clicking on the “**CLIENT LOGIN**” link at the top of the page. You can also bookmark the NetClient CS login screen in your browser.
- **Retrieving password:** Please remember to note your username and password in a safe place. If you don't remember your password, click the “**Forgot password?**” link in the login screen to have NetClient CS send you a temporary password via email or to reset your password by answering a series of security questions that can be set up after you activate your account. Also, you might be required to change your password at regular intervals for security purposes. Please note, you cannot reuse old passwords.
- **Security Questions:** Once you activate your account and login, you may see a prompt to set up your security questions. You can also set them up by logging on and click on your name near the upper right corner of the screen and selecting **Set Security Questions**. See *Image 3 (p. 6)* for details.
- **Logging Out:** Log out of NetClient CS by clicking your name near the upper-right corner of the window and choosing **Log Out**.
- **Disabled Login:** If you make 10 consecutive attempts to log in to a NetClient CS portal using an incorrect password, NetClient CS will disable the login for the portal. NetClient CS will also send an email message to the email address that is assigned to the login. The email message notifies the user of the unsuccessful login attempts and provides a link to enable the login. NetClient CS will enable the login after 30 minutes or when the user clicks the link in the email message.

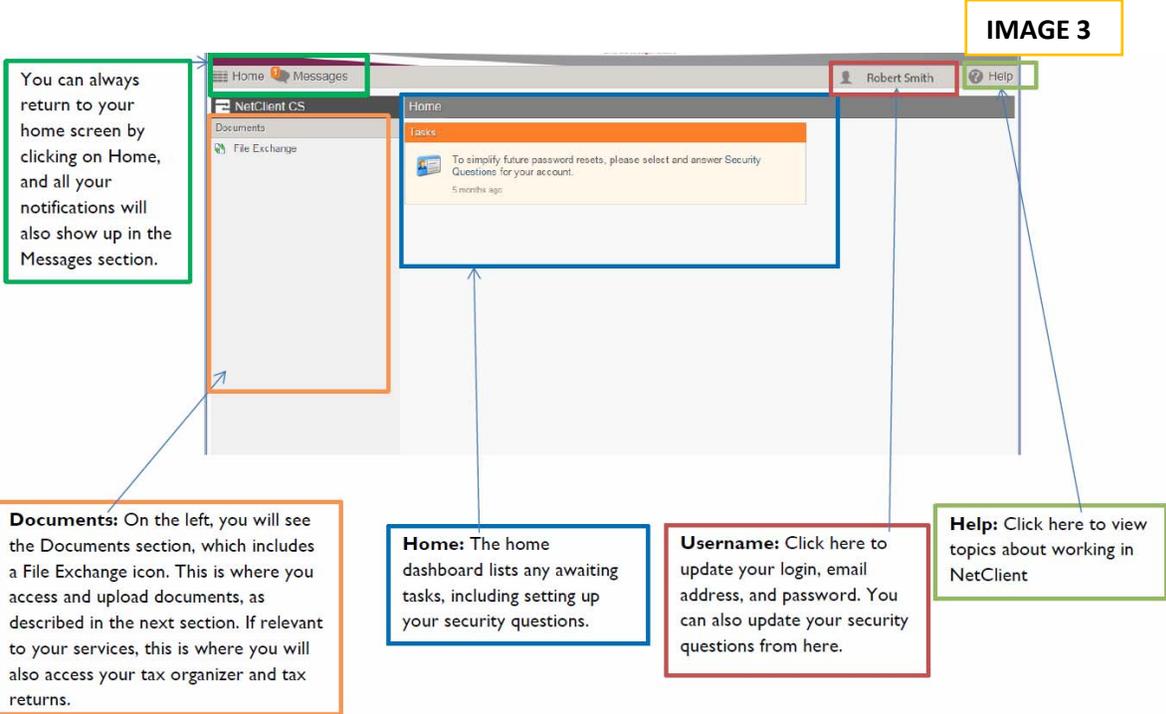
# Navigating your Client Portal

NetClient CS provides quick access to all of the features needed to manage your electronic documents. Once you login, you will notice a variety features in your portal.

To access your portal, go to [www.stevenzelin.com](http://www.stevenzelin.com), and click on “**CLIENT LOGIN**” link at the top of the page.



After you are redirected to the login screen and fill out your user name and password, you will notice the following features in your portal: Documents, Home, Username, and Help,



# Managing Documents with File Exchange

After registering your NetClient CS account, you can now view documents in **File Exchange**. File Exchange is a great way to instantly exchange working documents back and forth. Compared to email attachments, this method is much more secure, has fewer size restrictions, and complies with strict standards. Our staff can add documents to the File Exchange portion of the portal for you to review or retrieve. These documents include payroll reports, W-2 forms, 1099 forms, financial statements, etc. Similarly, you can upload the documents that we request of you through File Exchange; please call us or email us each time you upload documents into the folder.

If you are a tax client, you will have access to your tax organizer, once it is available. You will have the choice to submit documents through the organizer or through File Exchange. Details on submitting documents through either option are provided below.

## Viewing Documents in File Exchange

To view File Exchange documents once you've logged in, you:

**Step 1:** Click the File Exchange link in the Documents section on the left. A statement appears under the File Exchange icon if new documents are available. [Image 4.1]

**Step 2:** In the File Exchange screen, click a folder to view its contents. [Image 4.1]

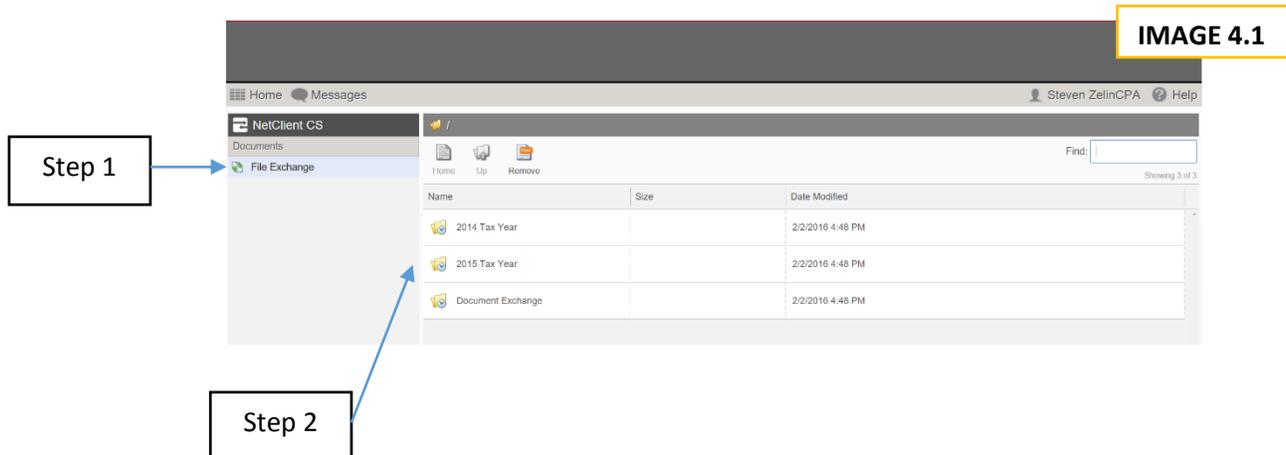
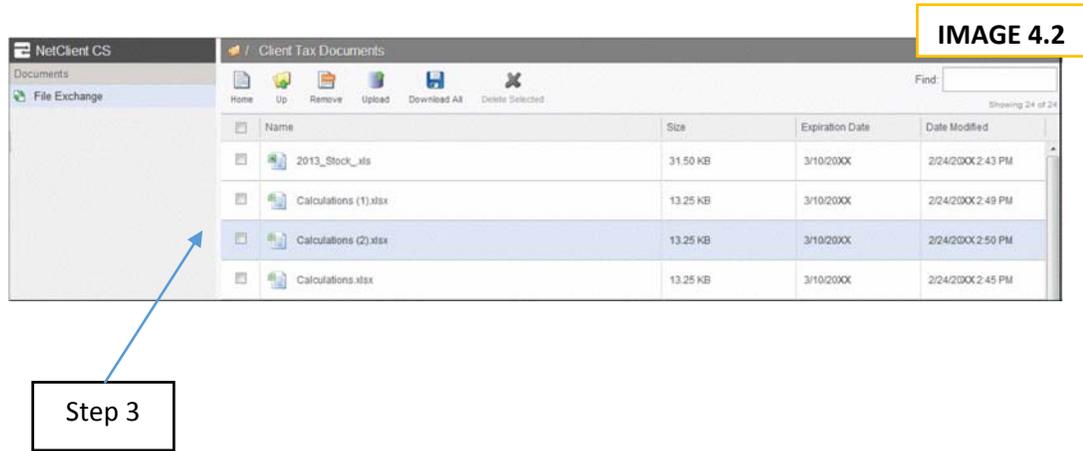


IMAGE 4.1

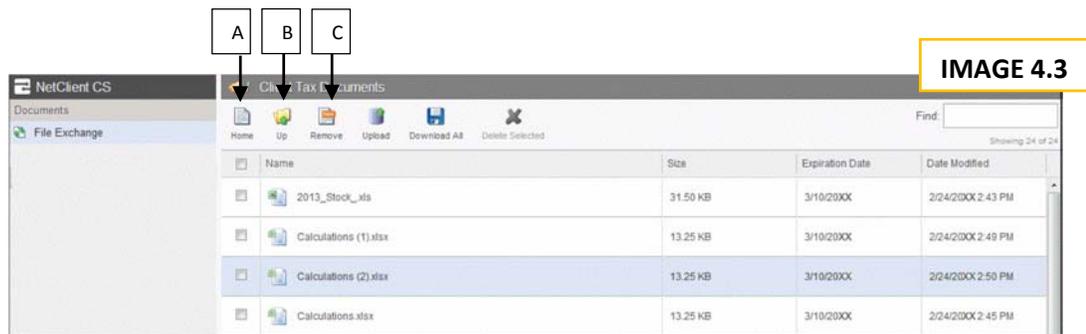
Step 3: Once you click on a folder, it opens up displaying all documents housed there; just click on any document to view it. It is important to note that you can view documents only if the applications in which the documents were created are installed on your computer. For example, to view a DOC or DOCX file, Microsoft Word must be installed on your computer. [Image 4.2]



Please note that File Exchange folders will be empty if we have not yet published any of your documents to File Exchange, or if you have not recently uploaded any documents.

A few tips for navigation:

- A** Click the Home icon to return to the top-level File Exchange folder.
- B** Click the Up icon to go up one folder level.
- C** Click the Remove icon to remove the red flags that appear to the right of newly uploaded documents.



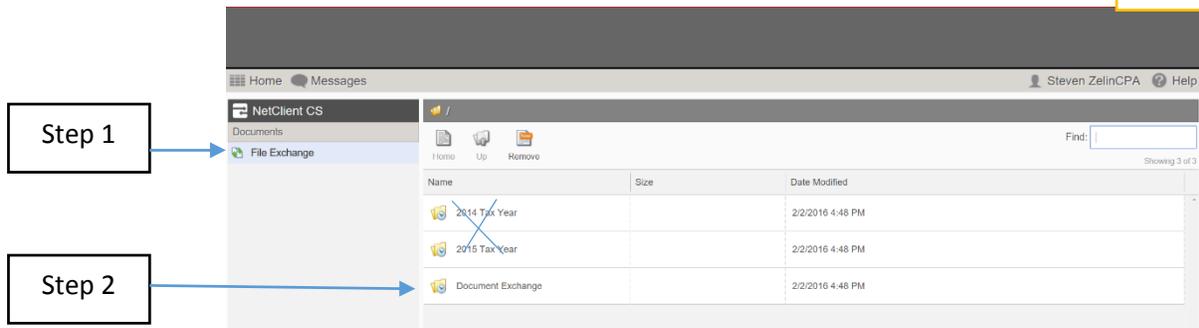
# Uploading Documents to File Exchange

You can upload documents or files by using the **File Exchange** feature of the portal.

Step 1: Click the File Exchange link in the Documents section on the left

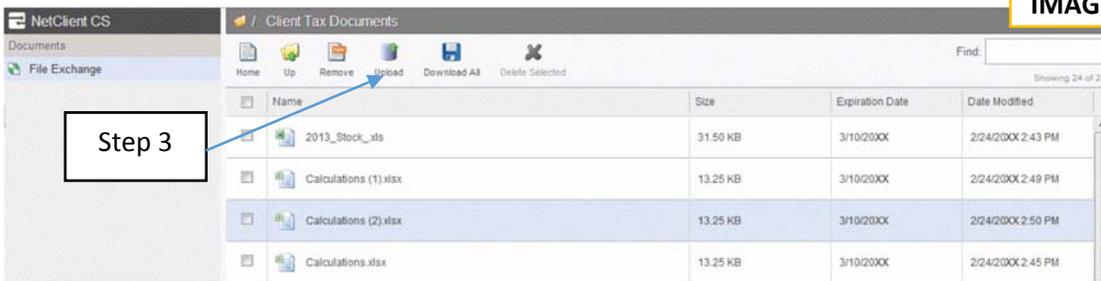
Step 2: In the File Exchange screen, click on the Document Exchange folder. **ALTHOUGH THERE MAY BE OTHER FOLDERS, PLEASE ONLY UPLOAD DOCUMENTS INTO THE DOCUMENT EXCHANGE FOLDER.**

**IMAGE 5.1**



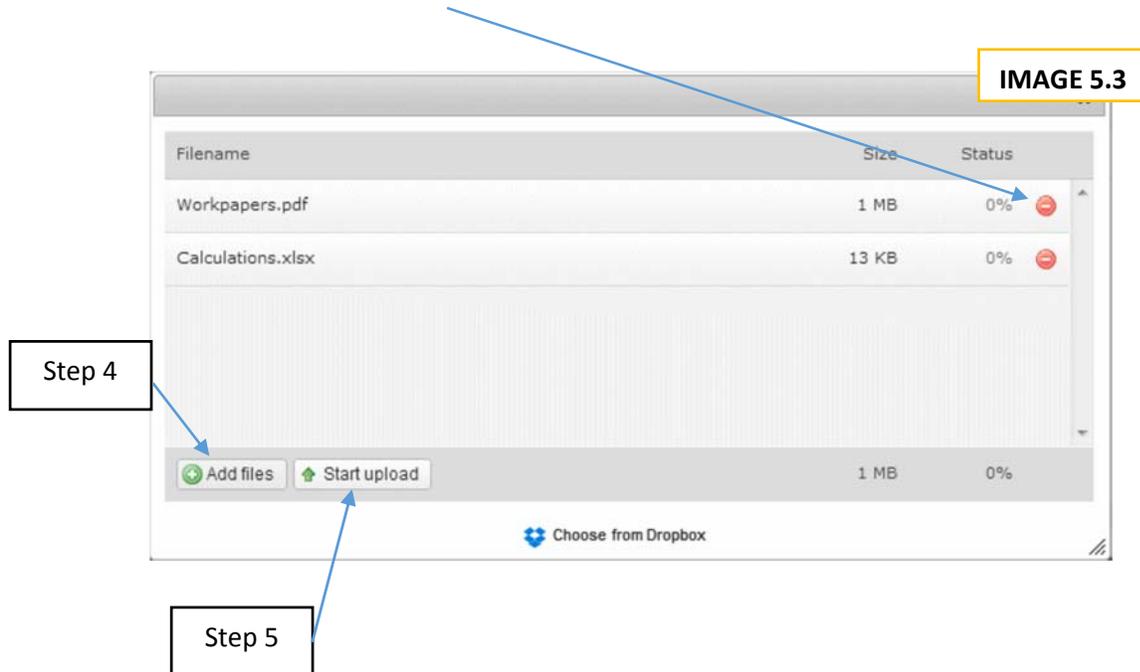
Step 3: Upload a document or file by clicking on the **Upload** icon.

**IMAGE 5.2**



Step 4: Click the **Add files** button. Depending on your browser, you may have the option to “drag file” into the document box.

Step 5: After you have added the files, select the **Start Upload** button. When the upload is complete, your documents or files can be accessed by our staff. To remove a document that you selected for upload, click the remove button to the right of the pending file.



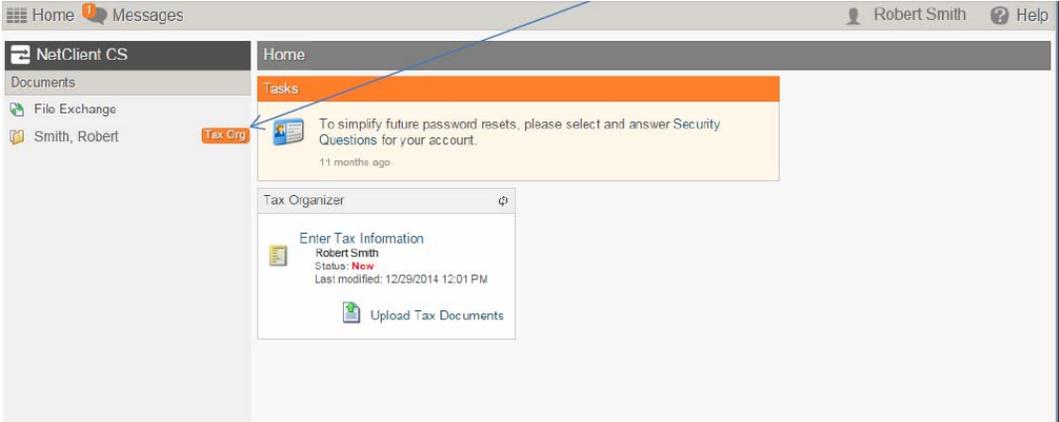
A few important things to note:

- You can upload files of any type to File Exchange. Note that TIFF files are converted to PDF files during upload.
- You can upload files of up to 2 gigabytes (GB).
- Your NetClient CS session may time out if your internet connection is not fast enough to complete a single upload within three hours.
- If you are a tax client, a tax organizer will appear on your portal (you will be notified when it is available). See below for instructions for uploading documents through your tax organizer.
- Please contact us when you upload files to your portal.

# Tax Organizer

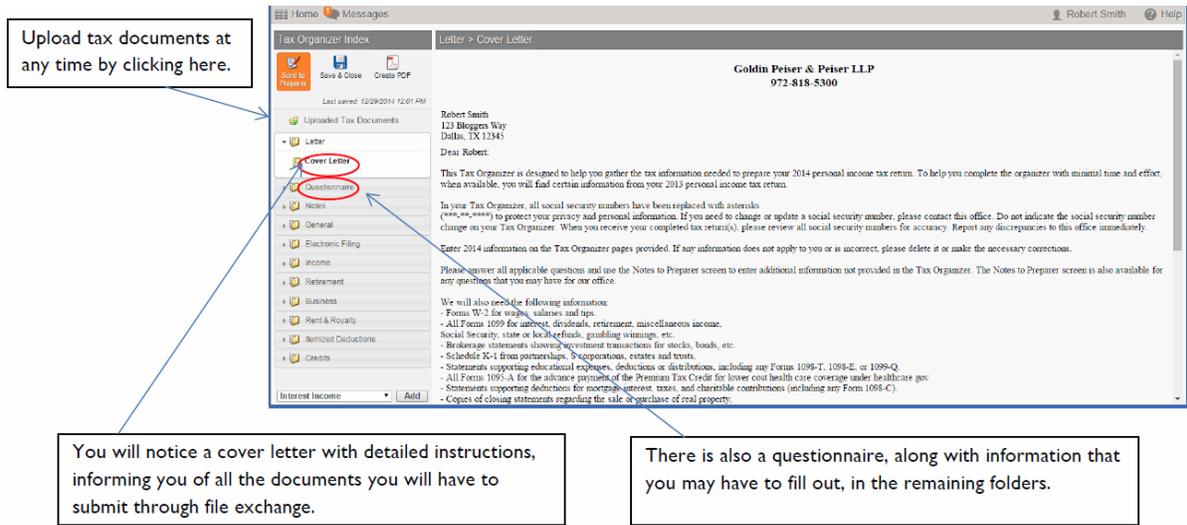
The Tax Organizer is another module that is available to those clients who use Steven Zelin, CPA's tax services. As tax season approaches, you will receive an email which notifies you that your tax organizer is available. When you log on, your tax organizer will appear in the document section on the left.

IMAGE 6.1



The Tax Organizer folder will have the orange tag next to it [Image 6.1]. Once you click on that folder, click on the tax organizer sub-folder to open your tax organizer. You will see instructions in the form of a letter, as well as a series of sections to be completed.

**IMAGE 6.2**



Tax documents may be uploaded at any time during the process of filling out your organizer. To upload documents click on the “Upload Tax Documents” icon found on the left side of the screen.

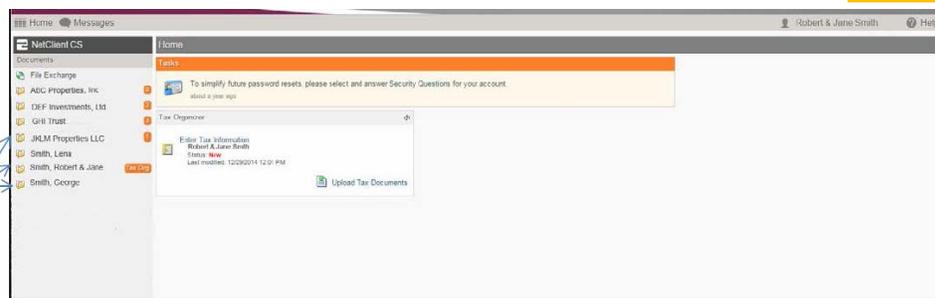
The tax organizer offers a convenient and secure way to send information regarding the preparation of your tax return without having to mail or deliver these documents to our office. You can attach the following types of files to your Tax Organizer: Microsoft® Money® or Quicken® tax exchange format (.txf), Microsoft® Excel® (.xls), Microsoft® Word® (.doc, .rtf), Adobe® Reader® (.pdf), image files (.jpg, .bmp, .tif, .png), and web pages (.html) by using the "Uploaded Tax Documents" link.

**PLEASE NOTE: ONCE YOU HAVE COMPLETED THE TAX ORGANIZER AND HAVE CLICKED 'SEND TO PREPARER' DO NOT GO BACK INTO THE ORGANIZER TO MAKE CHANGES OR UPLOAD ADDITIONAL DOCUMENTS. PLEASE CONTACT GPP IF YOU WANT TO MAKE CHANGES TO THE QUESTIONNAIRE. TO ADD DOCUMENTS, DO SO THROUGH THE DOCUMENT EXCHANGE FOLDER IN FILE EXCHANGE. See page 9 for instructions on uploading documents into the Document Exchange folder.**

## Tax Returns

If we prepare your tax return, you will be able to access it in the Documents section of the portal, upon completion. These returns and any previous returns will remain housed on the portal. This includes all tax returns related to your account, including your entities, each of which will have its own folder. These folders can be accessed at any time. K-1 documents are also housed in these folders.

IMAGE 7



Tax Returns: You may notice multiple files on the left Documents pane. These files contain tax returns for each individual/entity for which you have submitted, and can be accessed once the tax return becomes available.

# Appendix: Our Contact Information

If you have any questions regarding the Steven Zelin, CPA Client Portal, please do not hesitate to contact us:

Firm Name: Steven Zelin, CPA

Contact: (646) 678-4496

Email address: [steven.zelin@thesingingcpa.com](mailto:steven.zelin@thesingingcpa.com)

Website: [www.stevenzelin.com](http://www.stevenzelin.com)