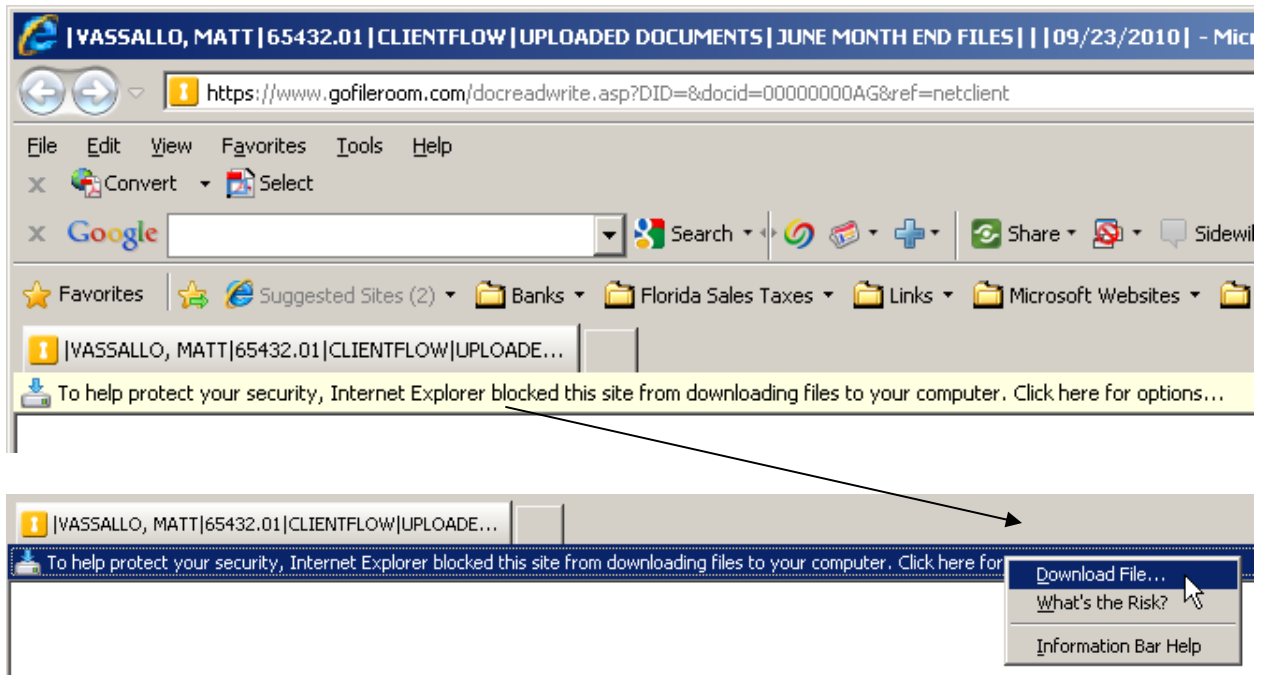


View, Print & Save Files with ClientAccess

You will receive an email with instructions and a link to setup your ClientAccess login. Click on the link and follow the instructions to setup your login and password. This step is a one time setup. If you've already created your login, skip this step.

- 1) **Login to ClientAccess:** Go to the Concannon website at www.concannonmiller.com and click on "Client Log-in" then "Secure ClientAccess"
- 2) Enter your email address and password.

Note: If during any of these processes you get the following yellow bar at the top of Internet Explorer click on it and select "Download File".



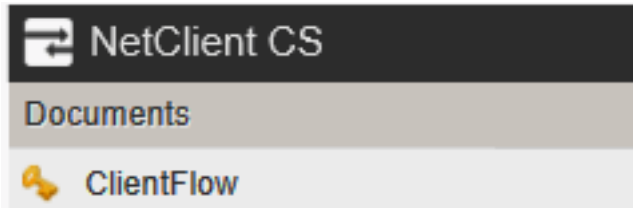
Note: In order to view PDF documents you will need to have either Adobe Acrobat or the Free Adobe Reader installed on your computer. Free Reader can be downloaded at the link below.



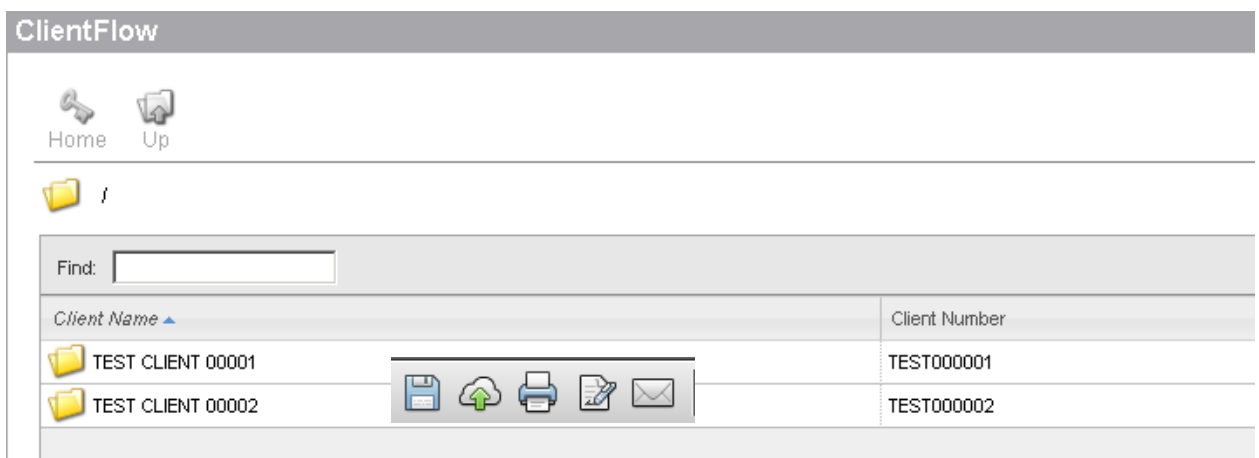
<http://get.adobe.com/reader/>

To View, Print & Save Files From the Portal

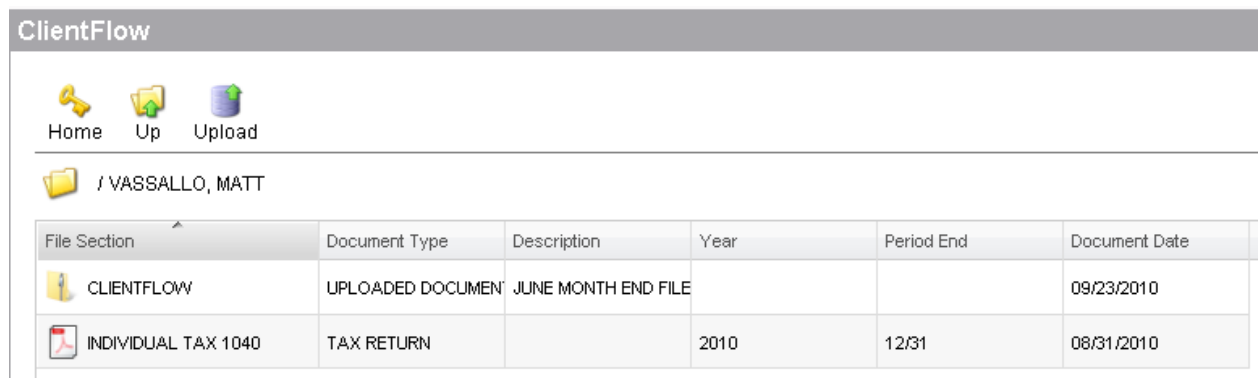
- 1) Once you are logged in you will be in the Home Section of the Dashboard. Click on the "ClientFlow" icon on the left of the screen:



- 2) Once you are in Client Flow, you will see a folder or folders if you have multiple companies.



- 3) Click on the folder and it will open to display the available files.



- 4) To view a file, click on the file and it will open.
- 5) To print the file, click the printer icon on the task bar.



- 6) To save a document to your computer, click on the "disk" icon, browse to where you want to save it and click Save.



- 7) To download either a QuickBooks back-up file or zipped files, click on that file to select it:

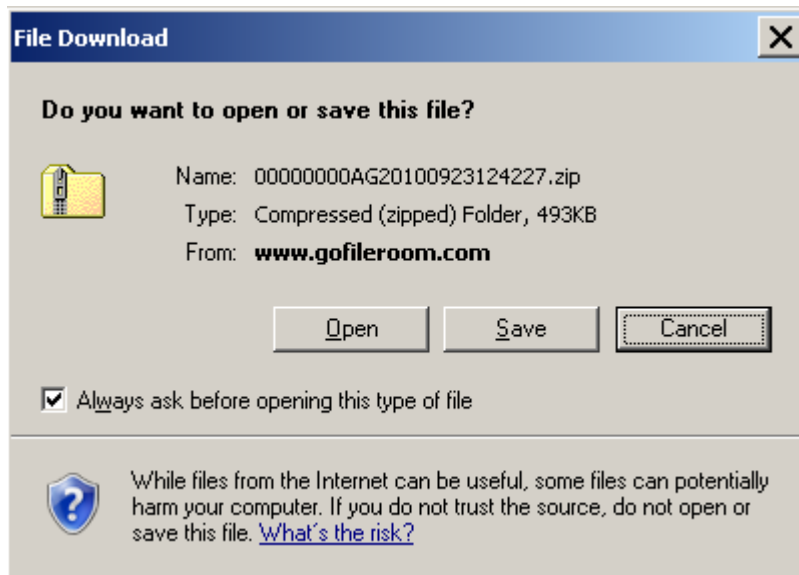
ClientFlow

Home Up Upload

/ VASSALLO, MATT

File Section	Document Type	Description	Year	Period End	Document Date
CLIENTFLOW	UPLOADED DOCUMENT	JUNE MONTH END FILE			09/23/2010
INDIVIDUAL TAX 1040	TAX RETURN		2010	12/31	08/31/2010

- 8) You will get a dialog box asking you to either Open or Save, select "Save"



Browse to where you want to save the file and select "Save".