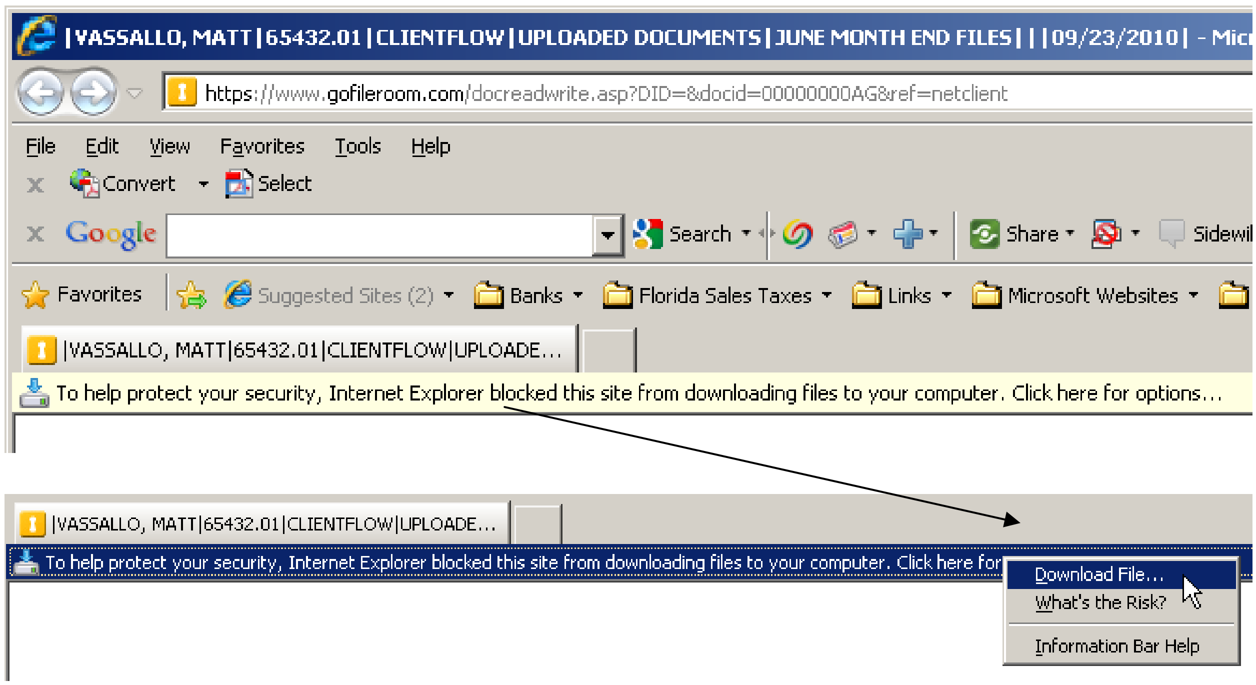
View, Print & Save Files on the “Net Client Portal”

You will receive a computer generated email with a link to the Net Client Portal login setup. Click on the link and follow the instructions to setup your login. This step is a one time setup and it you’ve already done this, skip this step.

1) To get to Net Client Portal you will go to the Concannon website at www.concannonmiller.com and click on “Client Portals” then “Net Client Portal”
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.

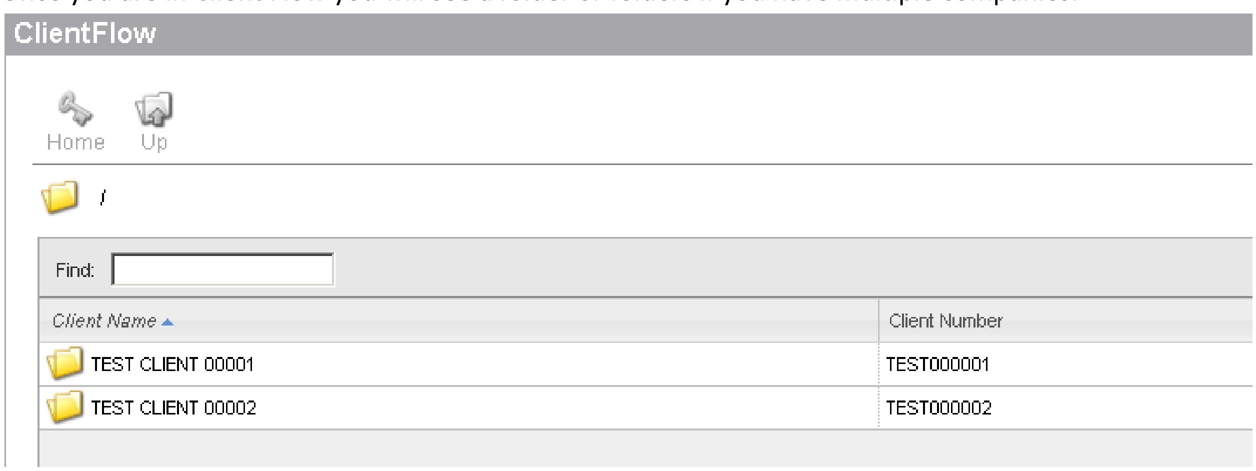
Get ADOBE® READER® http://get.adobe.com/reader/

To View, Print & Save Files From the Portal

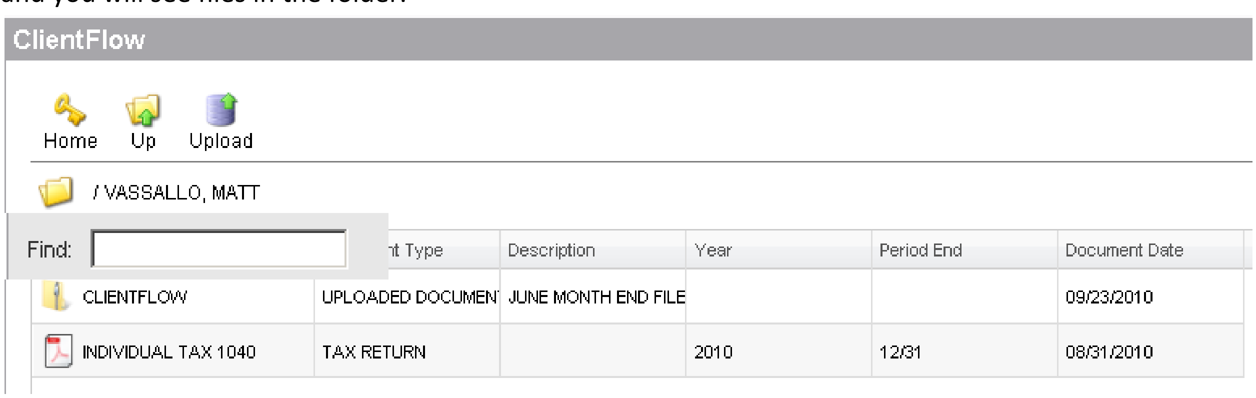
1) Once you are logged in you will be in the Home Section of the Dashboard:

2) Then next step is to click on "Client Flow" under the Document Management group.

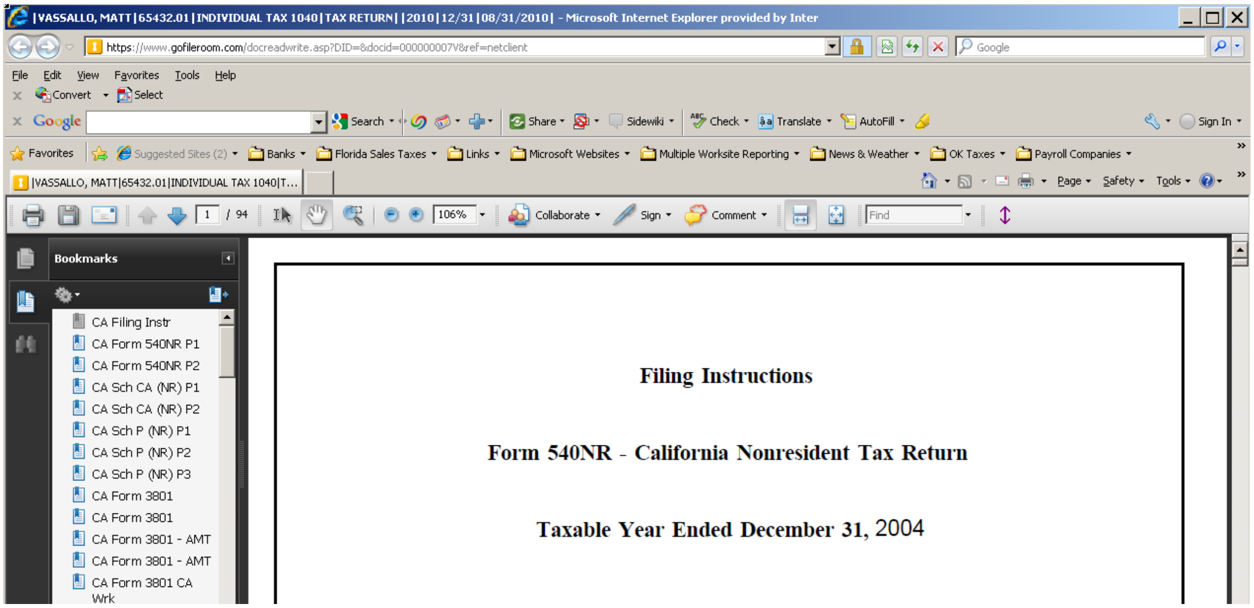
3) Once you are in Client Flow you will see a folder or folders if you have multiple companies.



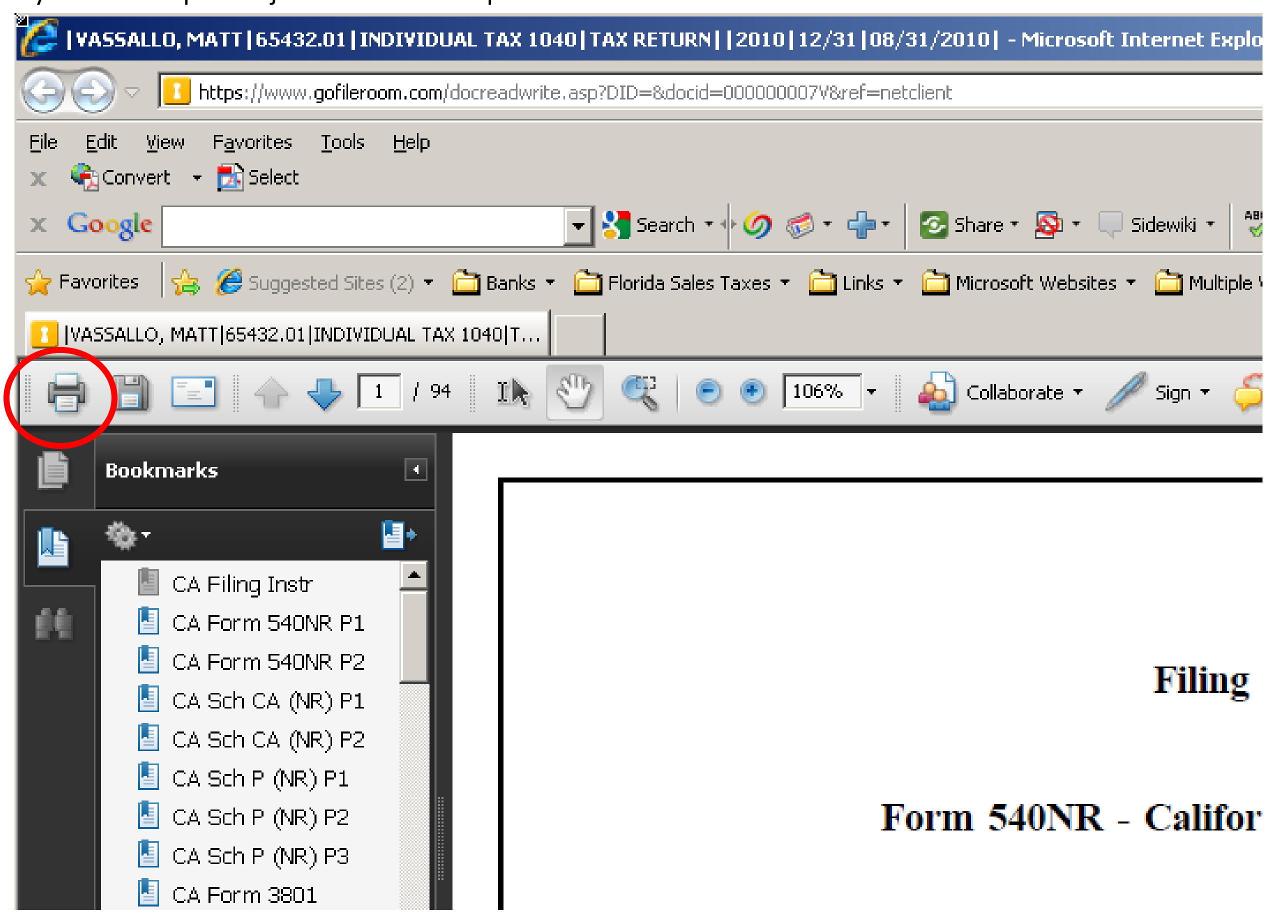
4) You will click on the folder of the company that you want to view files in and it will then expand and you will see files in the folder.



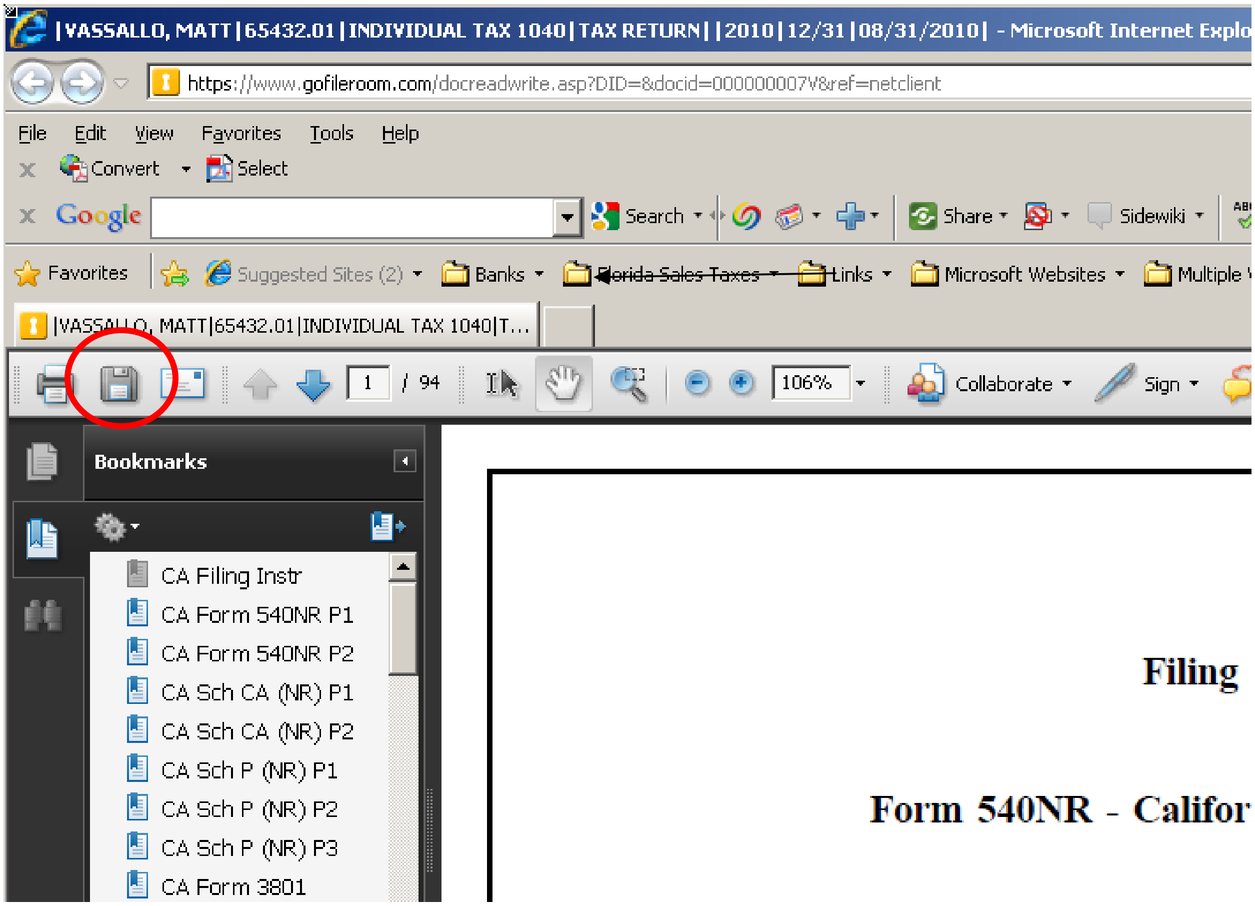
5) Now you will click on the file you want to view, we will view the 1040 in the sample and it will open in your browser. Now you can view it.



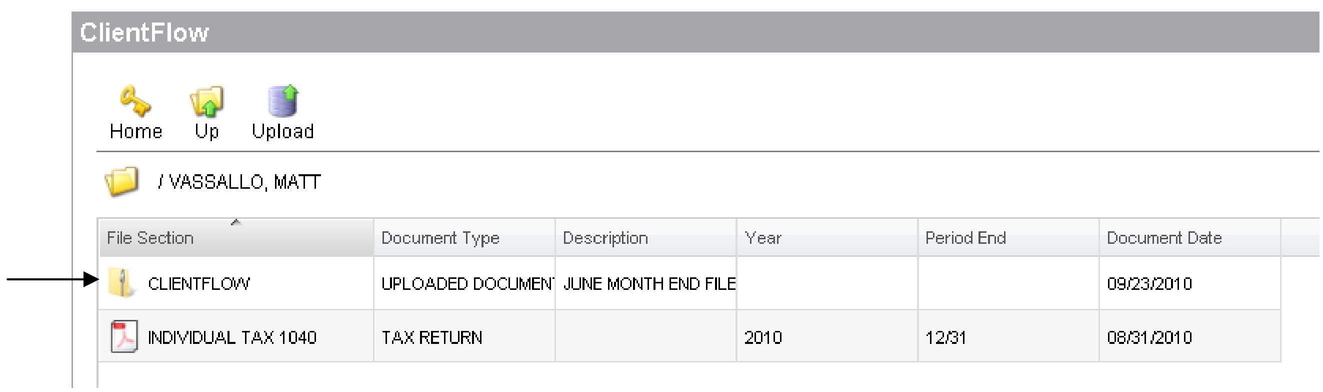
6) If you want to print it just click the little printer Icon in the Adobe task bar



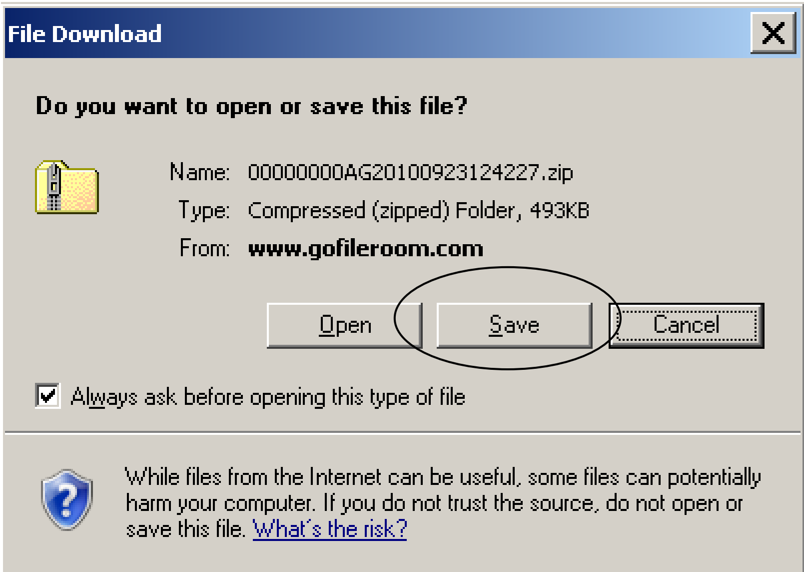
7) Now if you want to save this document to your computer click on the Save Icon and browse to where you want to save it to and click Save.



8) If you want to download either a QuickBooks back-up file or zipped files you would click on that file

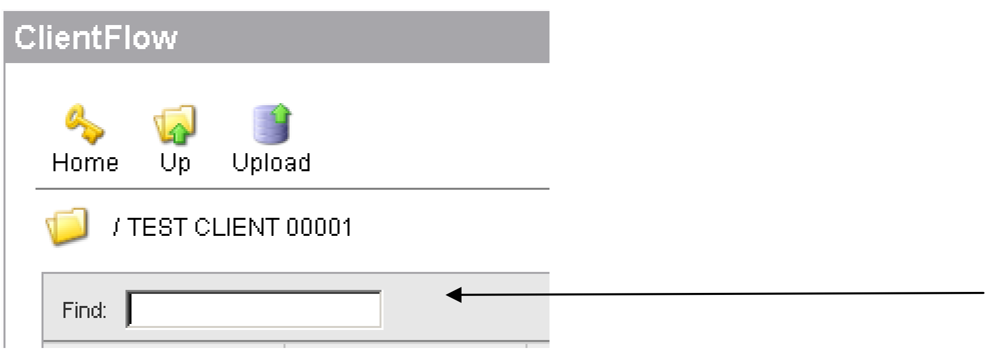


9) You will get a dialog box asking you to either Open or Save, select "Save"



10) The browse to where you want to save the file and click the "Save" button.

There is now a new search feature from inside the folder you can start typing in the "Find" box and it will take you to the files it finds. The best way to use is with a Period end Date which would be something like "12/10" and only the documents from December 2010 will show in the list.



Final Note: Always remember to "Sign Out" when you are done on the portal.