

### Signing into your NetClient account:

1. Browse to <https://secure.netlinksolution.com/nextgen/?firm=140125>
2. Enter the username and password you setup for your account from the Registration Email

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Please log in.

[Forgot password?](#)

- a. Click Log In
3. You are now logged into your NetClient Home Screen.
    - a. From here you can view File Exchange and Document presentation
      - i. File Exchange overview
        1. In the File Exchange screen, you will find files such as templates for forecasting, budgeting, and estimating taxes. You can view, download, and print these files at any time.
        2. In addition, you might find files that you will exchange with our firm in this screen. You can download these files to your computer, complete or modify them as necessary, and then upload the updated files to your portal where we can then access them.
        3. For example, if you use CD-based applications such as Client Bookkeeping Solution, Peachtree, QuickBooks, or Business Works, you can exchange bookkeeping data files with us through File Exchange.

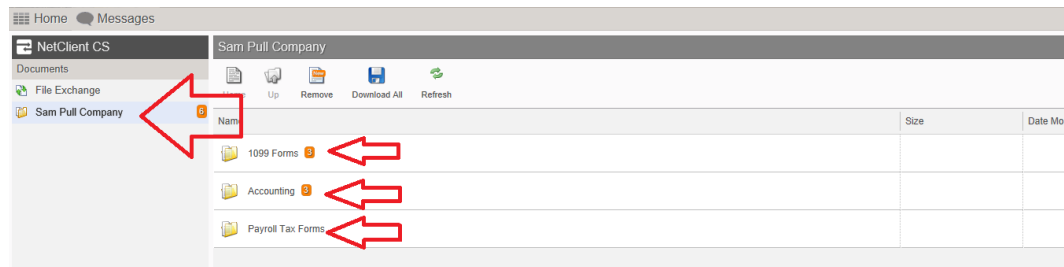


- ii. Document presentation overview
  1. On the NetClient home page you will see a folder or folders with your company or companies' names. This is the Document presentation folder
  2. Under the Documents presentation heading gives you access to static documents such as tax returns and financial statements. Links that are

named for the taxpayer contain personal documents; links that are named for companies contain business documents. If we uploaded a web organizer for you to complete, a Tax Org indicator appears to the right of the folder.

3. You can view, download, and print the files that are accessible through these links as often as necessary without having to request mailings or delivery. For example, if you're at a bank meeting to go over a loan application and you forgot to bring a copy of last year's tax return, you can log in to NetClient and download or print a copy of the return.

4.



#### Signing out of your NetClient account:

1. Click your name up in the top right corner
2. Click Log Out

