

Joseph W. Bowley & Co LLP

NetClient CS User Guide

This document is a basic user guide to help clients set-up, register and begin using NetClient CS.

NetClient CS

We are very excited to introduce a powerful new tool that provides you with secure access to your financial information and documents from the convenience of your desk, your home, your bank, or anywhere with an internet connection.

NetClient CS is a web-based portal, similar to online banking or investing, that lets you retrieve your tax organizer and copies of your tax returns, financial statements and more. It's also available 24 hours a day, 7 days a week, so you can access your information wherever you are, whenever you need it.

Joseph W Bowley & Co LLP will also provide you with permission to access a portal document management module called File Exchange. File Exchange is a fast and convenient way to exchange documents and information between you Joseph W Bowley & Co LLP. Unlike emails and their attachments, NetClient CS uses encryption technology so you will have confidence knowing that the information is secure when transferred back and forth.

Access and Use of NetClient CS:

Below are step-by-step instructions on using NetClient CS.

To access NetClient CS, we will create an account for you. You will then receive a registration e-mail from register@netclientcs.com. It is very important that you actively look for this e-mail, as your e-mail program may treat this e-mail as spam or junk e-mail.

Sample NetClient Activation E-mail:

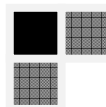
Dear Mr. Smith,

Welcome to NetClient CS. Please [Register](#) your account.

After you register your account, you can log in to NetClient CS from the NetClient CS [Login](#).

Thank you for using NetClient CS.

Joseph W. Bowley & Co LLP
27 W Church St
Blackwood, NJ 08012



Sample NetClient Registration Screen:

Joseph W Bowley & Co LLP

27 W Church Street
Blackwood, NJ 08012

Please log in.

[Forgot password?](#)

- Enter your e-mail address as your user login.
- Enter a password in the “Choose Password” field (The password must be at least (7) characters long and must include letters and numbers (e.g. password1). You may also use symbols (e.g. \$, %, #)
- Passwords are case sensitive.

Sample of Successful Registration and Login Screen:

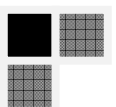
Joseph W Bowley & Co LLP

27 W Church Street
Blackwood, NJ 08012

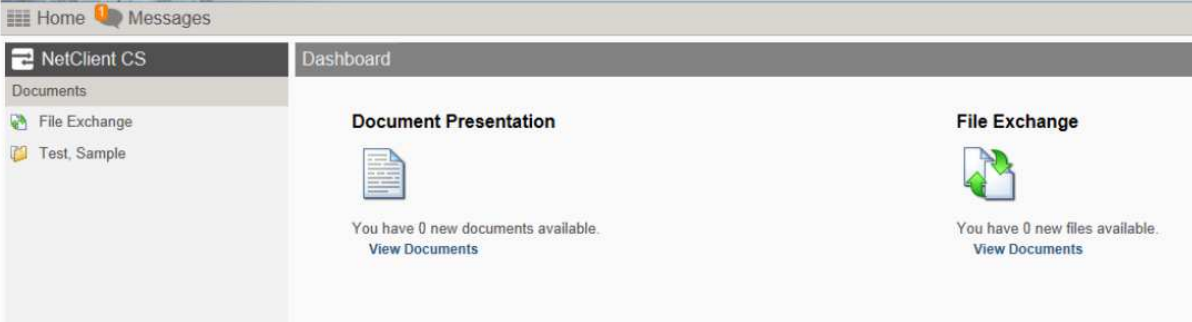
Please log in.

[Forgot password?](#)

- To confirm a successful registration, enter your login (e-mail address) and password created previously to access your portal. (See sample of the home screen below)
- If you forgot your password, you can request to have a temporary password e-mailed to you by clicking on the link “Can’t access your account”
- NOTE: For future access and to login to your NetClient CS after the initial login, visit our website www.jwbco.net, and then click on the Client Portal Login from the home page.

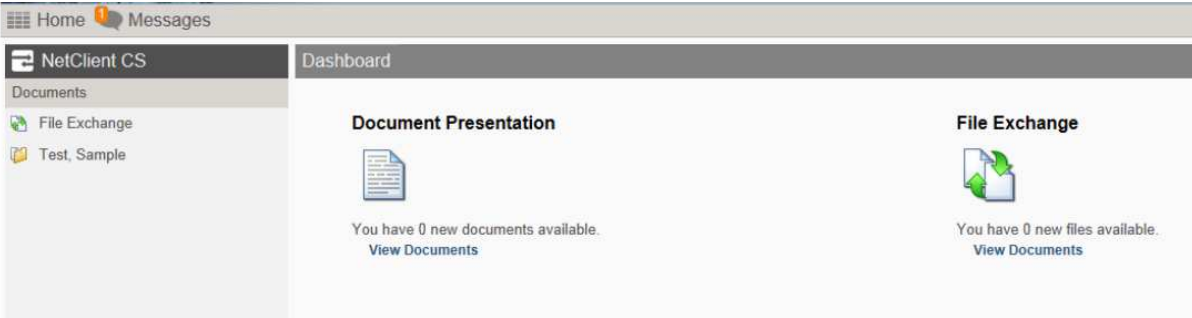


Sample of the Home Screen in the Client Portal:

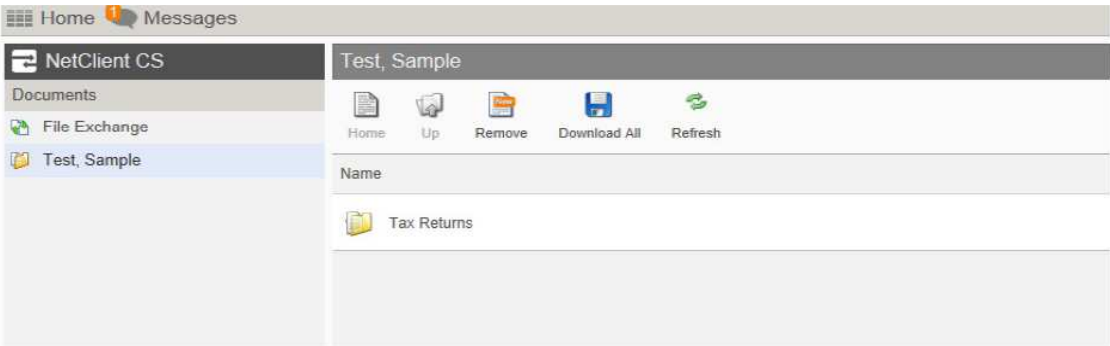


Document Presentation

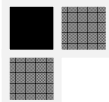
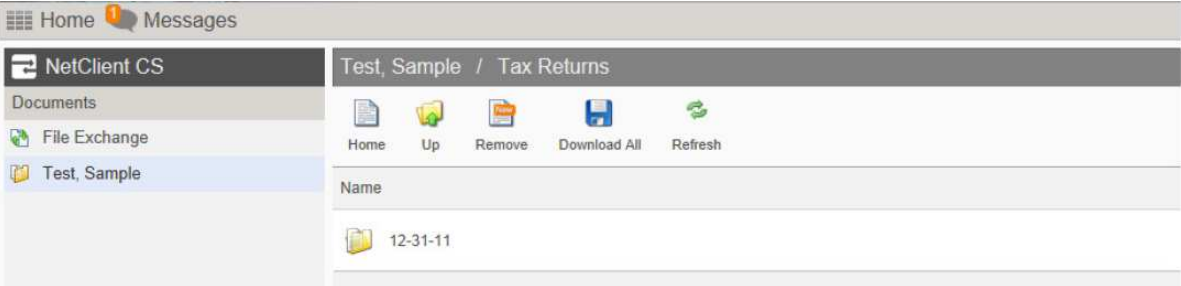
- To access your tax documents click on the folder (Test, Sample in this example) on the left hand side of the home screen under NetClient CS – Documents. See below.



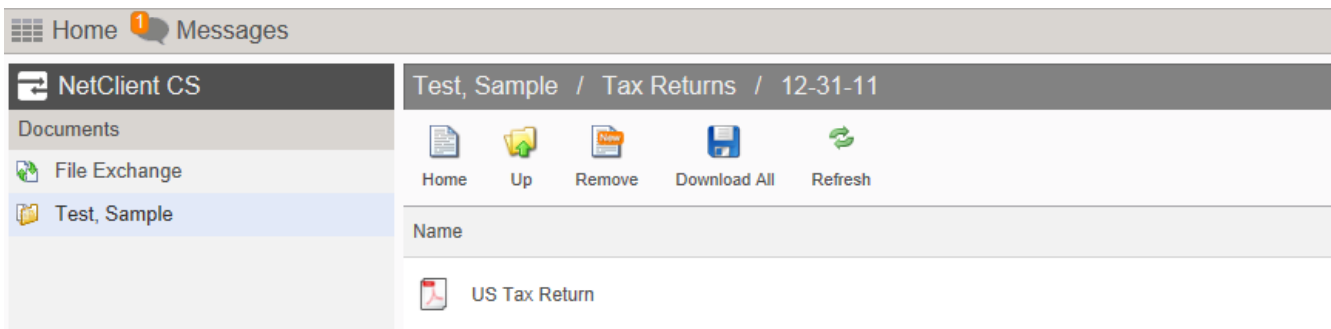
- Then double click on the folder in the body of the document titled Tax Returns.



- Then double click on the folder for the year end in which you want to view the tax return. (In this example 12-31-11)

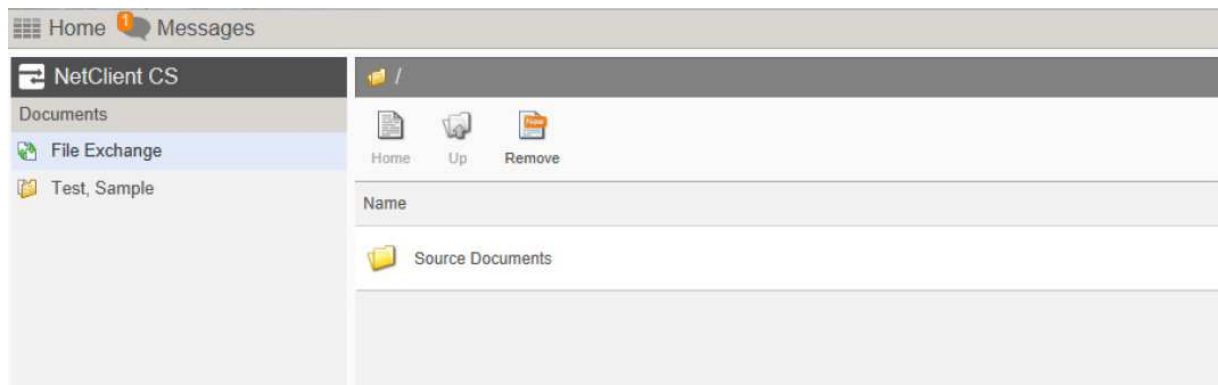


- Then double click on the pdf document titled US Tax Return. Depending on your internet browser the pdf will either download to your local computer for you to access or it will open up inside the web browser to view. Either way you are able to save the pdf directly to your local computer.
- Adobe Reader is required at minimum in order to review documents. In some cases, Microsoft Office Word and/or Excel files may also be available for your review. In those instances the necessary software application must be installed in order for you to be able to view the document.
- You can download the latest version of Adobe Reader by going to <http://www.adobe.com>

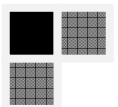


File Exchange

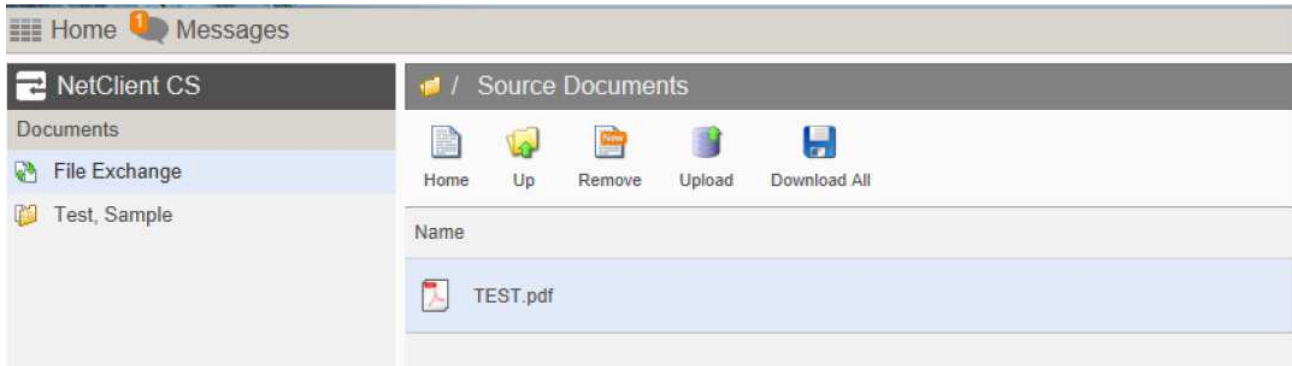
- We may from time to time exchange files with our clients. These files can be downloaded and uploaded through the NetClient CS portal. To access click on the File Exchange link on the left hand side of the home screen. You and our firm will be notified via e-mail when a document has been downloaded and/or uploaded to your portal.



- The source documents folder is where documents we send and documents sent by clients should be maintained. You can download and upload documents from this location.
- To download and save all documents at once, click down load all and depending on your web browser, you should receive notification on where to save the document. The system will download them as a .zip folder. You must extract the documents from this folder before you can access them.



- To save and or review a document one at a time, simply click that document and save directly from the application.
-
- To upload a document, click upload then click, “add files”, browse to the location on your computer where the document is located and select it. Once the document is populated in the upload screen click “start upload”.



Help and Support:

Please contact us at 856.228.8006

Or email us at jeff.bowley@jwbco.net

