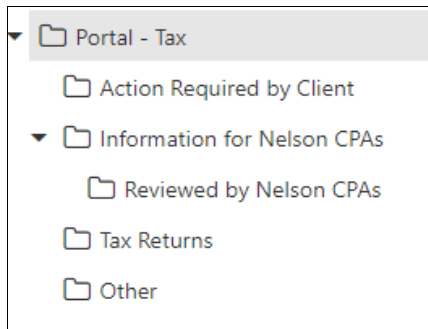


Instructions on Using Your Nelson CPAs Portal

Portal Layout and Information

After you register for your portal and gain access, you will see a list of folders applicable to your situation.



The following folders will be used by everyone:

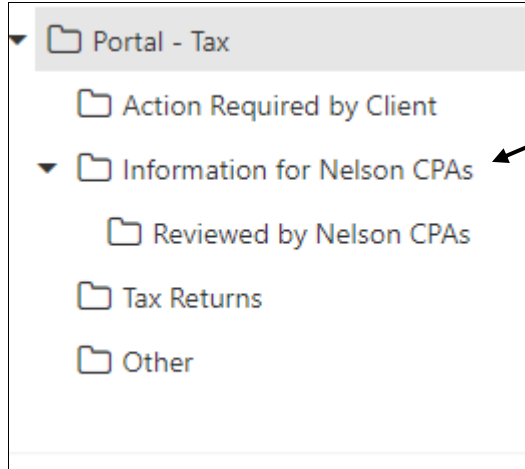
- Action Required by Client – This is where we will put documents where we need some action by you. For example, forms needing to be signed and returned to Nelson CPAs, invoices, and estimate coupons.
- Information for Nelson CPAs – **This is the only folder you should use** when you need to send documents to us or return signed documents to us.

Examples of other folders you may see:

- Portal – XXX – **For Nelson CPAs use only.** Please do not put any documents into this folder.
- Reviewed by Nelson CPAs – **For Nelson CPAs use only.** Please do not put any documents into this folder. You can check this folder if you are unsure whether or not you uploaded your information to us.
- Tax Returns – Copies of individual, business, and/or estate and trust tax returns will go into this folder. We will keep the returns here as long as you are a client of Nelson CPAs. You may download (or print a hard copy) if you desire.
- Payroll Reports – Used with our payroll clients
- Sales Tax – Used with our business clients
- Other – Used for additional engagements (e.g. tax planning)

Using the Portal to Upload (ie. send) Documents to Nelson CPAs

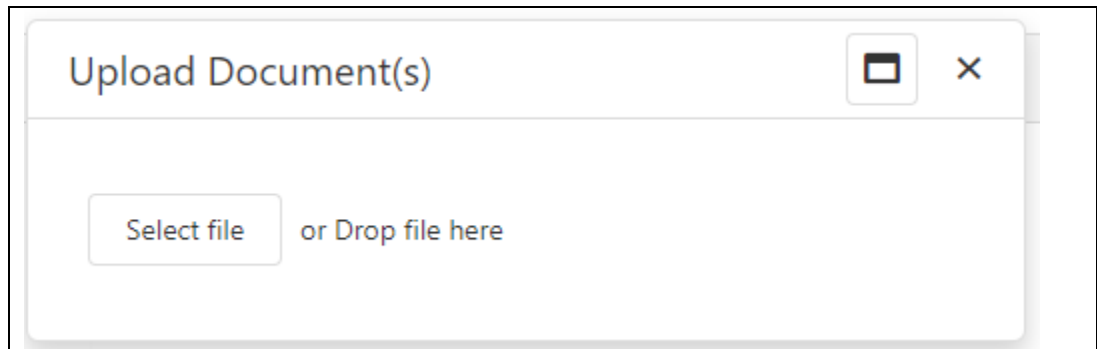
1. Click on the “Information for Nelson CPAs” folder



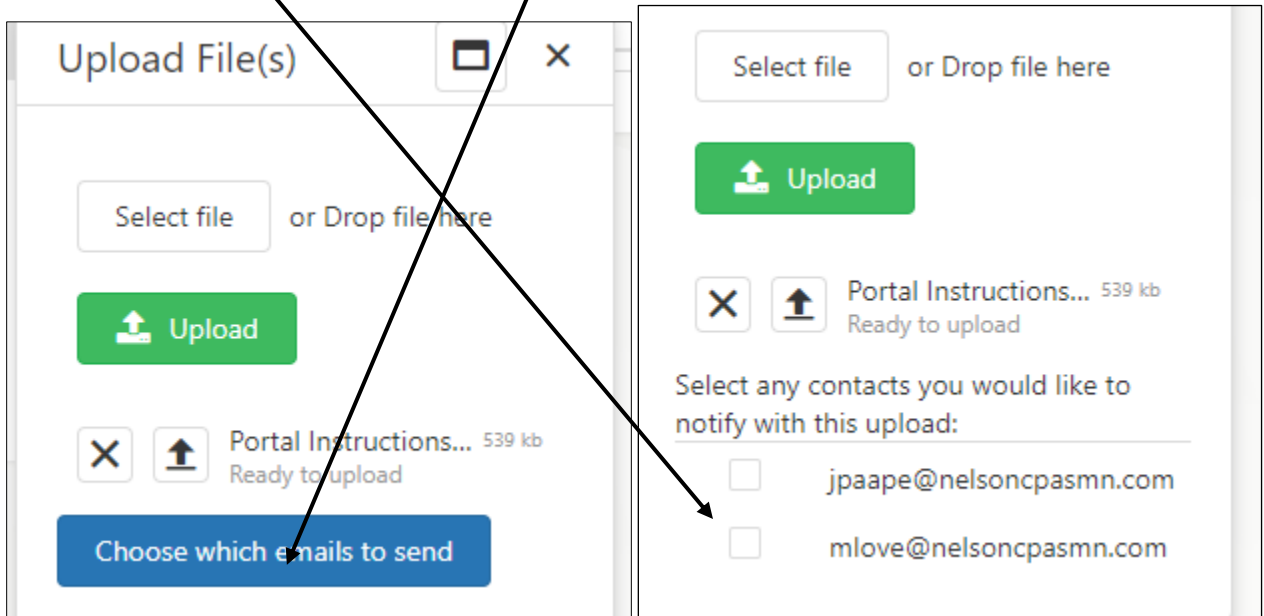
2. Click on the up arrow



3. Drag your document(s) to the “Drop file here” spot or click the “Select file” to locate a document from your computer



4. Click on the blue “Choose which emails to send” button, **if available**, and select which staff member you want to alert that you have uploaded a document



5. Click the green Upload button to send documents to Nelson CPAs
6. A message will flash saying the document was successfully uploaded and an email will be sent to our office that a document has been uploaded

Possible File Types

PDF This is the preferred file type for optimal resolution, viewing and file size. Use pdf format whenever possible.

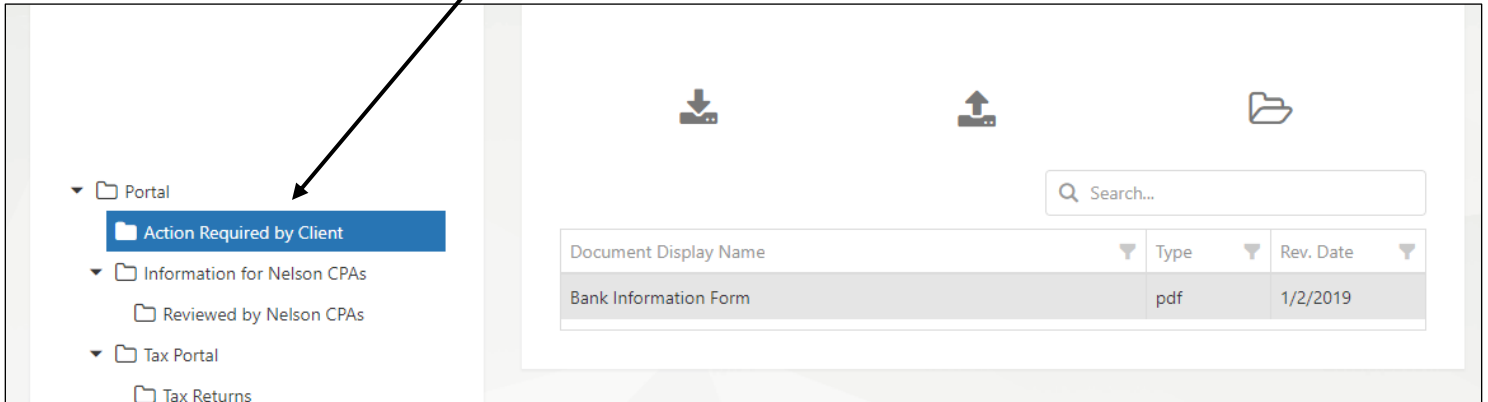
JPG Pictures normally are formatted as jpg file types. Most cell phone photos are jpg files. If at all possible, **please convert jpg files to pdfs** before uploading. JPG files are often extremely large and difficult to work with.

Word, Excel, CSV, etc.

You may upload working files using these formats without restrictions.

Using the Portal to Download or Print Documents Nelson CPAs Sent You

1. Click on the “Action Required by Client” folder



2. Click on the down arrow



3. Select the location on your device where you want the document to end up
4. Save

If you have any questions or need additional assistance, please contact Mary Love at mlove@NelsonCPAsMN.com or 651-455-4621 x114.