

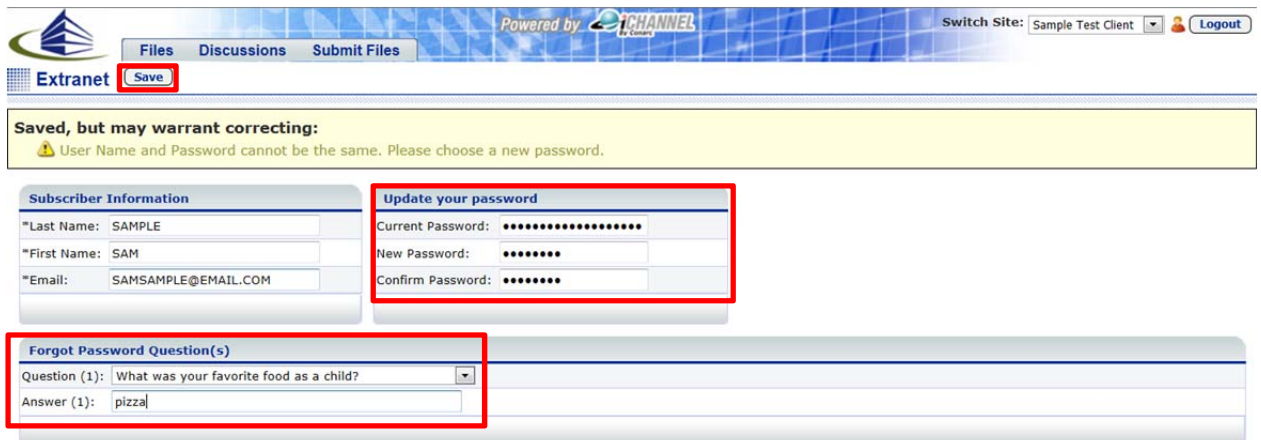
Portal Instructions

Signing into your portal

1. Sign into your portal with the user name (**YOUR EMAIL ADDRESS**) and password (**YOUR EMAIL ADDRESS** - if this is the first time using the new portal). If you have used the portal in previous years, and forgot your user name or password, click forgot password.



2. Once you've accessed the portal, you will be prompted to change your password from the default password and choose a security question and password.
3. **Be sure to click the Save button when you are done.** Failure to click save will require you to sign in using your default user name and password and you will be prompted to change your password again.



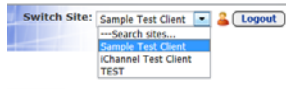
Viewing Files

1. Click on the Files tab to view files DeLeon & Stang, CPAs has published to your portal. Files
2. Confidential Documents
 - a. Tax returns, financial statements, audit reports and other confidential information will be posted here.
3. General Document
 - a. Bills, invoices and non-confidential information will be posted here.



Submitting Files

1. Be sure you are in the correct portal. If you have two or more clients with DeLeon & Stang CPAs, you will have two or more portals.
 - a. Personal and business return
 - b. Audit more than one of your companies
 - c. Personal and dependent related returns
2. If you have more than one portal you can switch between them by selecting them from the



Switch Site drop down box.

3. Be sure you are in the correct portal (site) before you submit files.
 - a. Click on the Submit Files tab to submit files to DeLeon & Stang, CPAs. Submit Files
 - b. Click the Browse button Browse... to upload multiple files (any file types) at one time.
 - c. Click the Upload icon to upload the files to DeLeon & Stang, CPAs. Upload
 - d. To view the files you submitted click the Submit Files tab. Submit Files
 - e. Click View Submission History. [View Submission History](#)
 - f. The files you upload will appear. Note, you cannot click these files.

Submitted Files

Submitted	File
1/16/2013	TRIAL BALANCE_20130116_2019.XLSX
1/16/2013	GENERAL LEDGER_20130116_2019.XLSX
1/16/2013	GENERAL LEDGER_20130116_2019.PDF