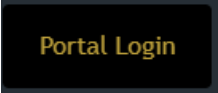


A Step By Step Tutorial to the Portal

To Log In...

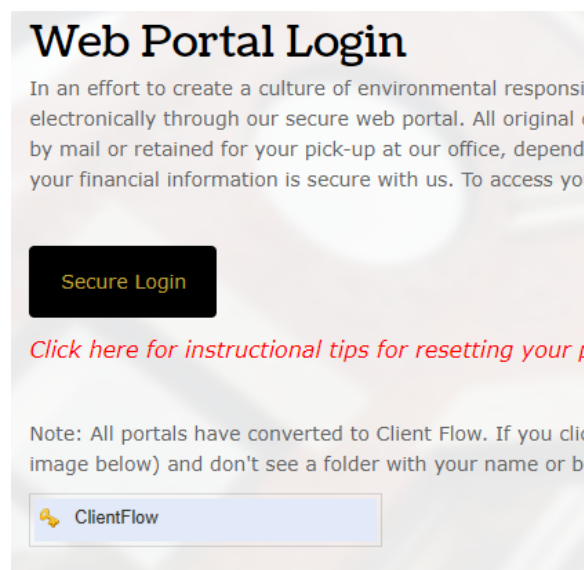
Go to <https://www.masonrich.com>
(This will bring you to the Mason + Rich Home Page)

A black rectangular button with the text "Portal Login" in yellow font.

Click on  in the top right hand corner of the screen.

This will bring you to the page where you log into the secure Portal.

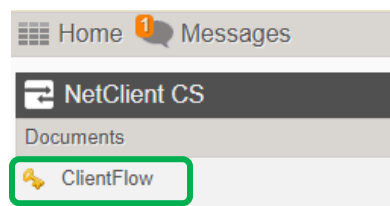
Click on “Secure Login”



Enter your Login and Password (Remember the Log In and PW are case sensitive).

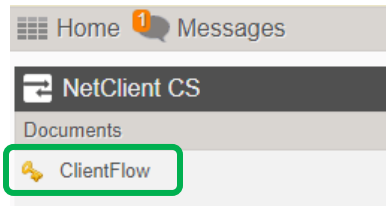
Note: Please keep your password somewhere that is easily accessible, realizing that you may only use it a couple of times a year. We have no access to your password. If you forget it, you can reset it through the website (Click “Secure Login” and enter your Login then click “Forgot Password?” and follow the prompts).

Once in your Portal you will see “**ClientFlow**” on the left hand side of your screen. This is used for transferring documents back and forth (you to M+R and M+R to you) securely. If you wish to send something to us, you will need to **UPLOAD** it into the portal.

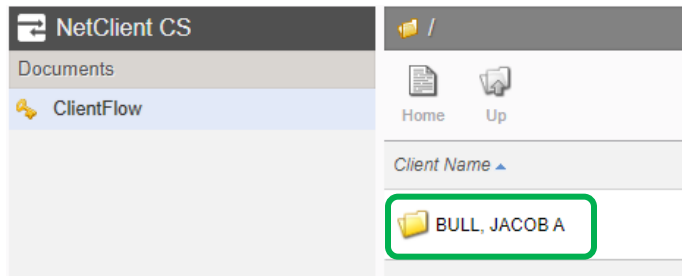


To Upload Documents to the Portal:

Once in your portal, click on “ClientFlow”



Click **once** on the correct folder in the right hand window. (Your available folders may appear different - you may have one option or many depending on how many accounts we have with you.)

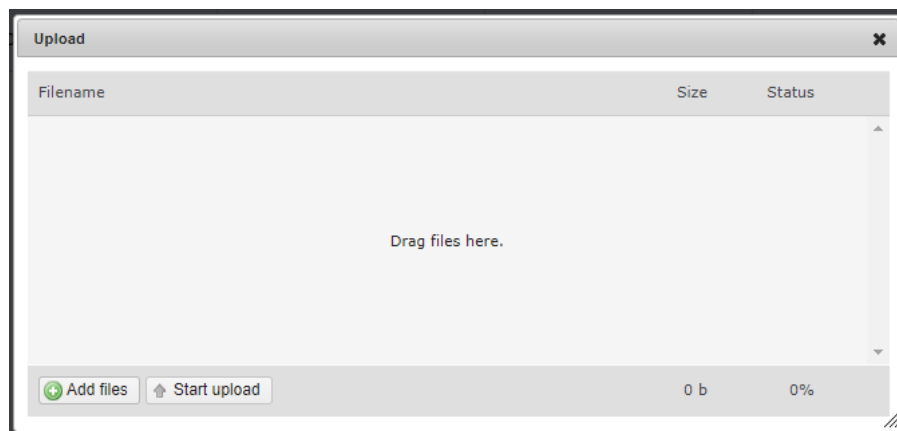


The menu items below your name will be as follows:



- “Home” will bring you back, from wherever you are in the portal, to the Home Page
- “Up” will bring you to the previous level of folders (i.e. back one page)
- “Upload” is how you upload your documents to the portal

Choose “Upload”. Once you click on this, a gray box will appear that say “Drag Files Here”.




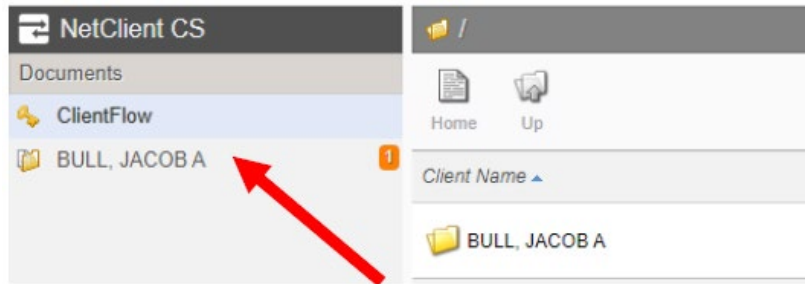
You can now Drag and Drop your files into the box or you can click on the “Add Files” button in the bottom left hand corner of the box. If you choose this method, you will be prompted to browse for your documents on your computer. Once you have located the file you wish to upload, double click on it and a copy will appear in the box.

Once you have placed/dragged and dropped your documents into the box, click “Start Upload” in the lower left hand corner of the box. When the upload is complete, you will see the file in your portal. **Please do not close out of this process until you see the upload is 100% complete. If you close out too soon the transfer will not go through.**


That’s it. Once you see them on the screen, you are done. If you leave the portal at that time, your accountant will receive an email letting them know you have placed something in the portal. No need to email or call them to let them know - the notification is instant.

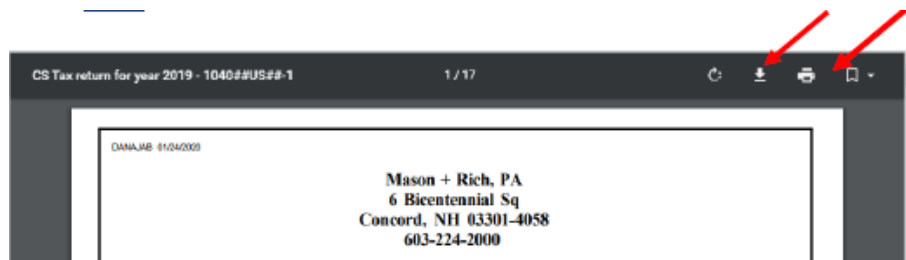
To Retrieve Documents From Us:

Most all items we provide for you will be in the  **ClientFlow** section of the portal.

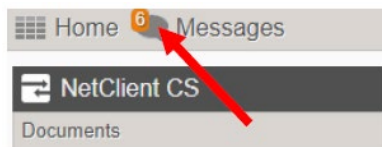


Only tax returns delivered to you via Web Delivery will appear on the left side (outside of ClientFlow).

To access your documents, click once on  **ClientFlow** and a folder structure should appear on the right hand side with a folder for each of your accounts with us. Click once on the folder you wish to access. A listing of all available documents will appear. If you click once on the document, it will open. You will be able to download or print the document.



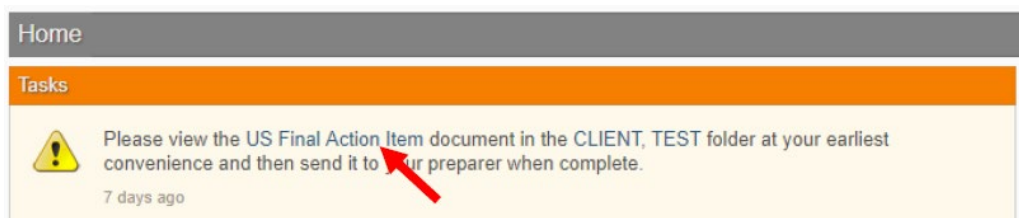
Note: it is important that you pay close attention to any “**Messages**” we send you throughout the year. You will see a number in ORANGE letting you know how many messages you have from us.



Action Items are very important!

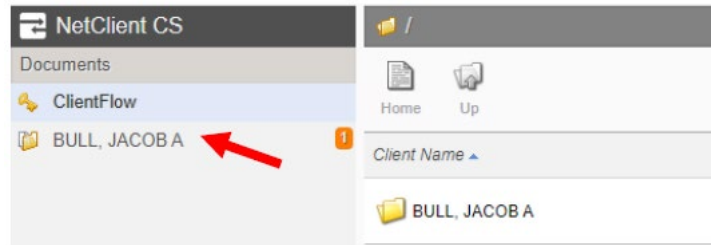
Do Not Ignore Them!

These are items that need to be signed and returned to us or sent on to the IRS or State or both.

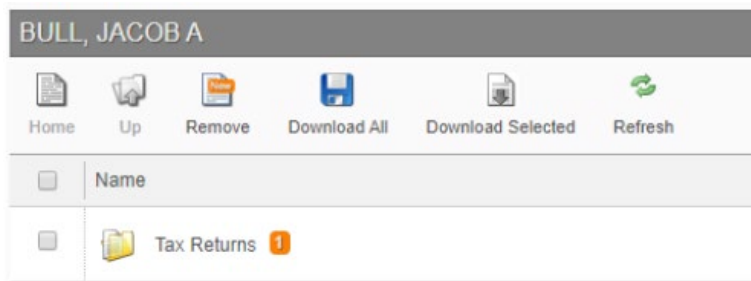


We receive an email notification when you drop something in your portal, you too will receive an email notification if your tax return is added. However, if you accountant uploads something to your portal they will call or email you as you will not automatically receive a notification.

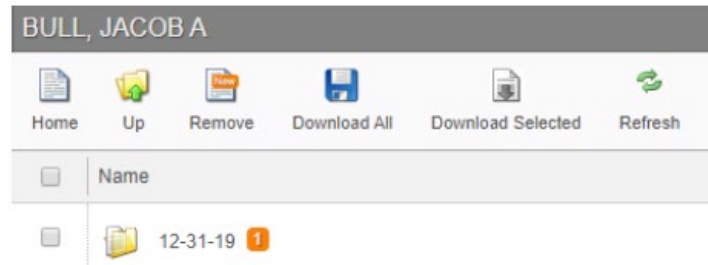
Your Taxes, for instance, (if you choose to have them delivered to your portal) will show up in a folder with your name on it below the ClientFlow folder.



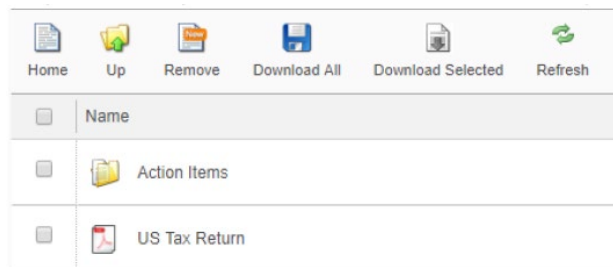
Double click on this file and your tax folder will appear in the right hand window.



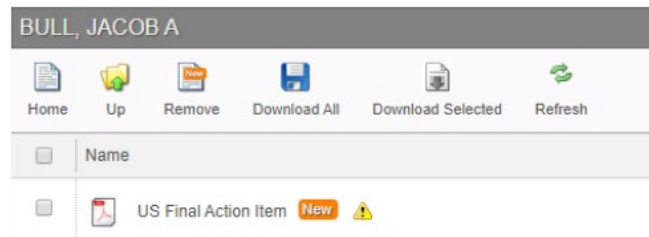
Click once and they will show up by year.



Then click on the year folder and you will see your return as a pdf, which you can download or click to view. You also have a separate folder for the action items to be addressed. From here you can save the documents onto your own computer and file or print or transfer them to wherever or whomever you like.



Action items that need to be addressed will look like this:



So there it is... your tutorial of the portal - it is that easy and very secure. You'll be a pro in no time!