



**Witt Mares, PLC
and
iChannel
Client Portal Guide**

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Client Portal User Guide

Welcome to the Witt Mares, PLC iChannel Client Portal provided by Conarc. The Client Portal is a feature of a larger Document Management System, called iChannel, which has been implemented by Witt Mares, PLC. This portal offers a secure location for you to upload documents of your own and access data to which Witt Mares has given you permission. Via the internet, you now have access to published data 24 hours a day, 7 days a week. All data that resides on the portal is encrypted and your data can only be accessed via your assigned login.

This guide will walk you through logging into your personalized, secure portal site. It will also show you how to access your documents and how to upload your own documents.

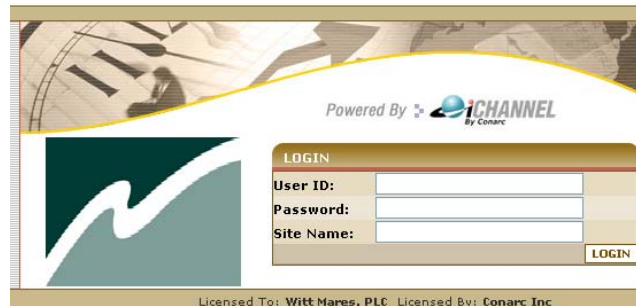
* **Special Note:** If using Internet Explorer to browse the Internet, you must have Internet Explorer 7 or higher to properly access this site. Internet Explorer may be downloaded for free from the Microsoft website at <http://www.microsoft.com/downloads/en/default.aspx>.

Logging into the Portal

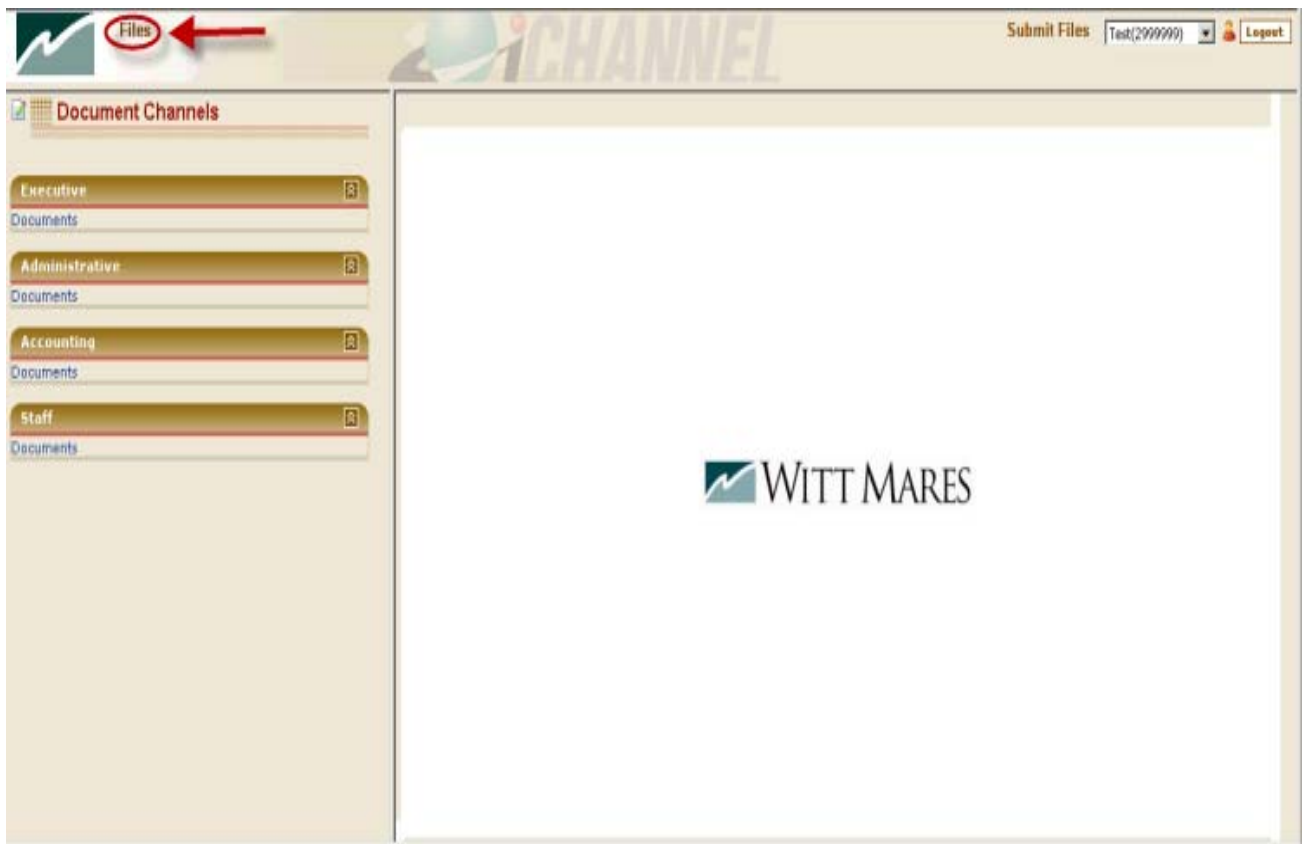
You will be provided with the following information needed to login to your Portal. Record that information here:

Website: https://iportal.wittmares.com
User Id: _____
Password: _____

1. Go to the provided website. You will see a login screen much like the one below.

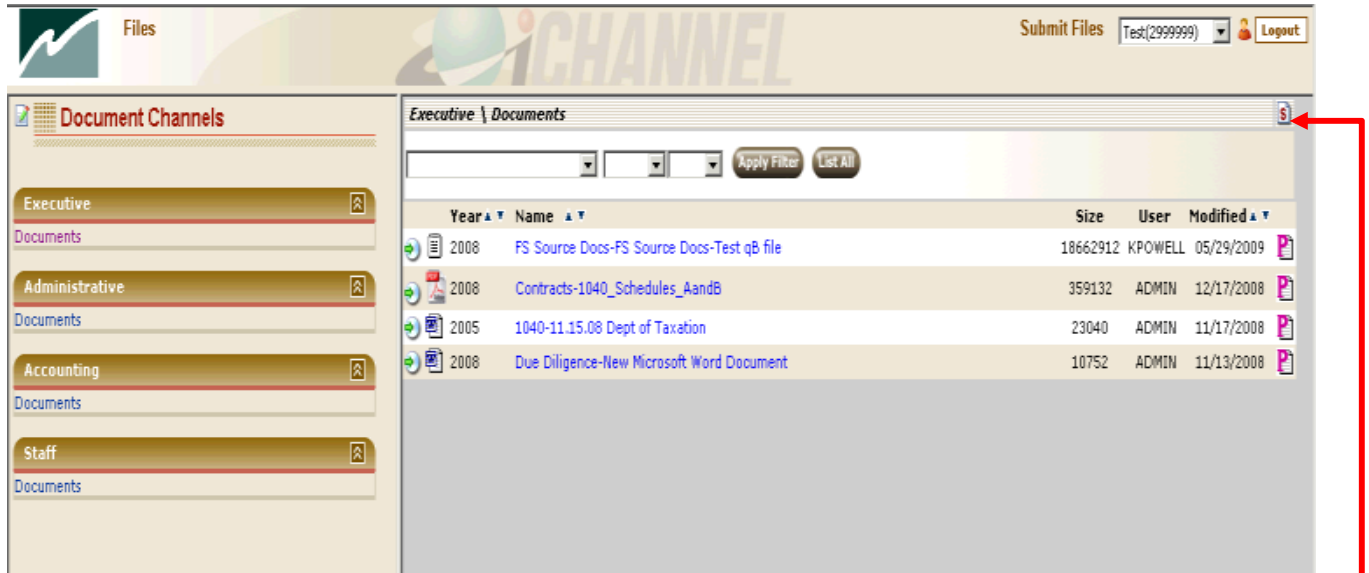


2. Enter the user id and password.
3. Click the Login button. Your Witt Mares client portal will open.
4. Begin by clicking on the "Files" hyperlink at the top to see the document menu if not already visible.



Accessing Your Documents

You can only access documents that Witt Mares has published for your use. The menu on the left is organized by Channels (Executive) and Topics (Documents). Click on the topic name to display the documents in the File List area in the right frame (a list will not appear if documents have not been published for your use). Documents may be sorted by choosing from the various filtering drop-downs and then clicking the Apply Filter button. To clear a filter, click the List All button. You can also click on the arrows in the column headers to sort by Year, Name, or Modified date.



Year	Name	Size	User	Modified
2008	FS Source Docs-FS Source Docs-Test qb file	18662912	KPOWELL	05/29/2009
2008	Contracts-1040_Schedules_AandB	359132	ADMIN	12/17/2008
2005	1040-11.15.08 Dept of Taxation	23040	ADMIN	11/17/2008
2008	Due Diligence-New Microsoft Word Document	10752	ADMIN	11/13/2008

Document Actions



Opening Documents - To open a document you may click on the document icon or the title. You will be prompted to Open or Save the document. Select OPEN. You must have the software installed on your computer to open the document. For example, Adobe Reader will open PDF files, Microsoft Excel will open Excel files, Microsoft Word will open Word files, etc.

You can download a free version of Adobe Reader at the following website:
<http://www.adobe.com/products/acrobat/readstep2.html>

NOTE: If you are not prompted to open or save, you may get an error when opening the document. If you get the error, click the “d” icon in the upper right corner and it will become an “s” to indicate that it is now available.

Printing Documents - You may print the open document to your local printer using the software's print functions i.e. File/Print or by clicking on the printer icon in the application's toolbar.

Saving Documents - Documents that Witt Mares has published on the portal for your access can be saved to your local system. Click on the document icon or the title and select SAVE when prompted. If the document is currently open, click File/Save or the Save button on the application toolbar. Select a drive and folder located on your system to save the document i.e. C:\.

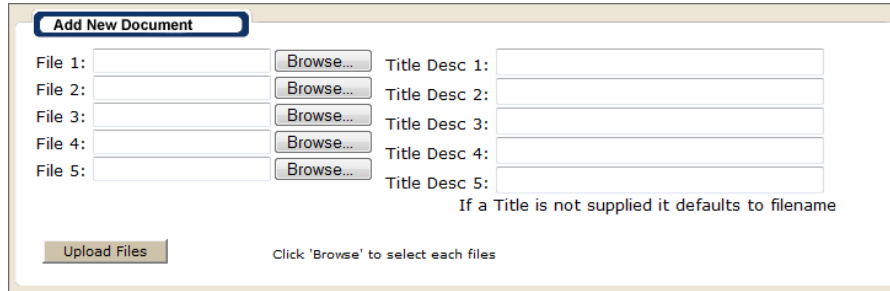
Submitting Documents

iChannel allows you to submit documents to Witt Mares quickly and easily. A notification email is automatically sent to your Witt Mares contact person upon a successful submission.

1. Click the Submit Files hyperlink in the upper right corner of the iChannel screen.

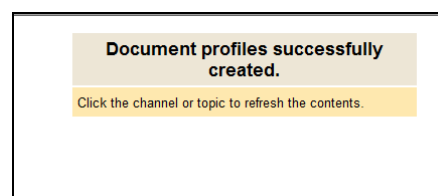
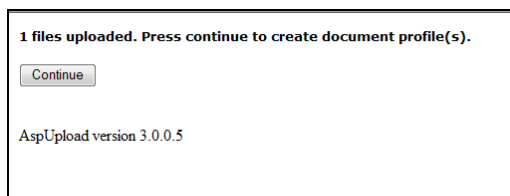


2. The Add New Document screen will open.



The 'Add New Document' form contains five rows, each with a 'File' input field, a 'Browse...' button, and a 'Title Desc' input field. Below the form, there is an 'Upload Files' button and a note: 'Click 'Browse' to select each files'. A footer note states: 'If a Title is not supplied it defaults to filename'.

3. Click Browse to locate the file you wish to upload. You may upload 5 files at once.
4. You can add a title to your document to make it easy to read. Please do not exceed 30 characters.
5. Once you have selected and titled your documents, click the Upload Files button. You will get a notification screen where you can click the Continue button. This screen will automatically continue if you do not click it. The next screen will notify you if the document was successfully added.



NOTE: You will not be able to see this document. The contact person will receive the document and may give you access once it has been saved.

Changing Your Password

Once you log in to your portal you may want to change your password.

1. Click the My Profile tab at the top of the screen. Locate the Password area.
2. Enter your current password.
3. Enter your new password.
4. Re-enter your new password.
5. Click Submit at the bottom of the screen. You will receive confirmation in red when the password is changed.
6. Click the logout link (box with green plus sign) at the upper right corner of the screen and then login again with the new password.

Emailing Your Documents to a Third Party

You can save the documents from the portal to your personal computer for emailing to a third party (e.g. copies of tax returns to your bank).

1. Open the document from the portal.
2. File, Save as, and browse to a folder on your own PC. Save the document.
3. Begin a new email in your own email program.
4. Attach a file to your email by browsing to the location on your PC that you've saved this document to.
5. Open and secure the attached pdf file with a password, if desired.
6. Send email.
7. Delete the temporary file from your PC, if desired.