

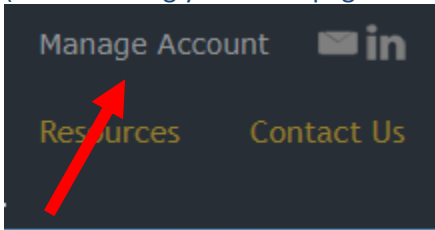
A STEP BY STEP TUTORIAL TO THE PORTAL

WARNING: It looks pretty daunting, but only because every step is listed (down to the minutest detail)

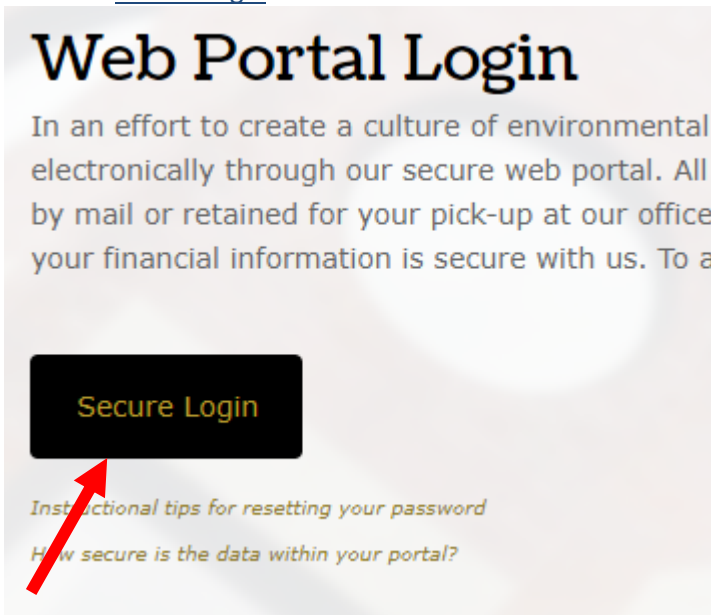
To **LOG IN**...

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

Click on “[Manage Account](#)” in the upper right hand corner of the screen.
(This will bring you to the page where you log into the Portal)



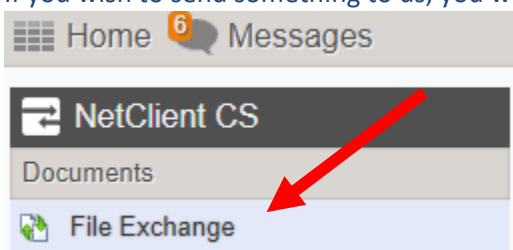
Click on “[Secure Login](#)”



Enter your Login and Password (Remember...The Log In and PW are Case Sensitive)

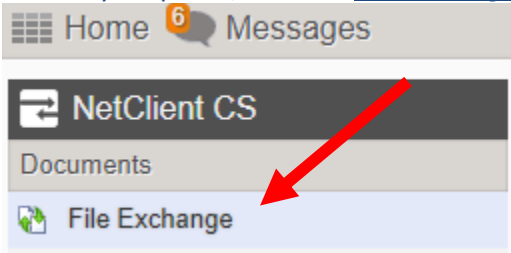
Note: Please keep your password someplace that is easily accessible, realizing that you may only use it a couple of times a year. We have no access to your password. If you forget it, you can reset it through the website (Click “[Secure Login](#)”. Enter your Login then click “[Forgot Password?](#)”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

Once in your Portal you may see “[File Exchange](#)” 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.

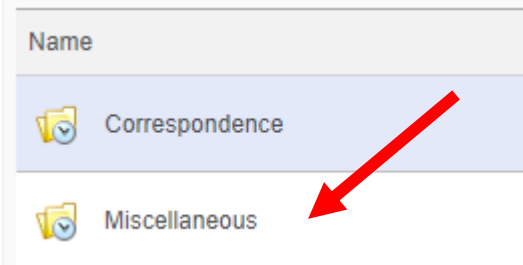


TO UPLOAD DOCUMENTS TO THE PORTAL:

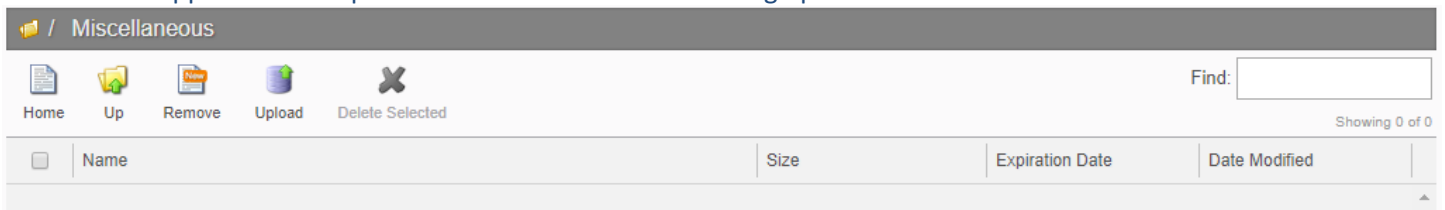
Once in your portal, click on “File Exchange”



Click on the “Miscellaneous” Folder in the right hand window. (Your available folders may appear different)

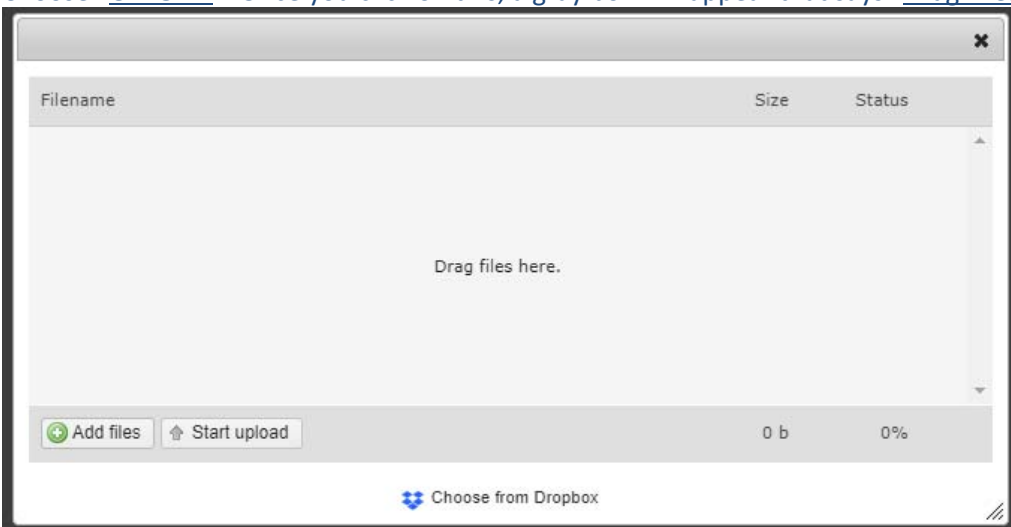


A ribbon will appear at the top of that window with the following options:



- “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)
- “Remove” will remove new flags for the item checked off
- “**UPLOAD**” is how you upload your documents to the portal
- “Delete Selected” will delete a document you have placed in the Portal. (Check the gray box beside the document and click “Delete Selected” to delete the document)

Choose “**UPLOAD**”. Once you click on this, a gray box will appear that says “Drag Files Here”.



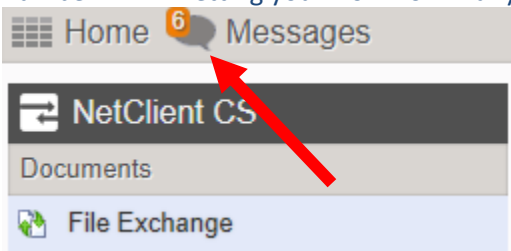
You can now Drag and Drop your files into the box or you can click on the “Add Files” button in the bottom left hand corner of the box. If you choose this method, you will be prompted to browse for your documents on your computer. Once you have located the file you wish to upload, double click on it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

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 RETREIVE DOCUMENTS FROM US:

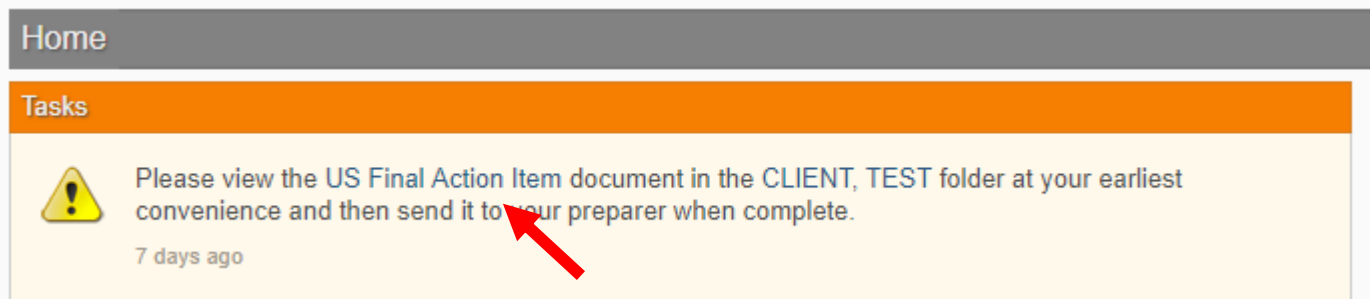
NOTE: It is important that you pay close attention to any “**Messages**” we send you throughout the year. You will see a number in RED letting you know how many messages you have from us.



ACTION ITEMS are very important!!!

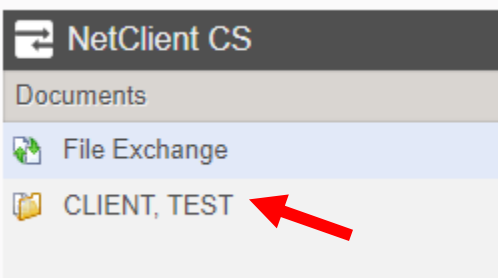
These are items that need to be signed and returned to us or sent on to the IRS or State or both.

DO NOT IGNORE THEM!

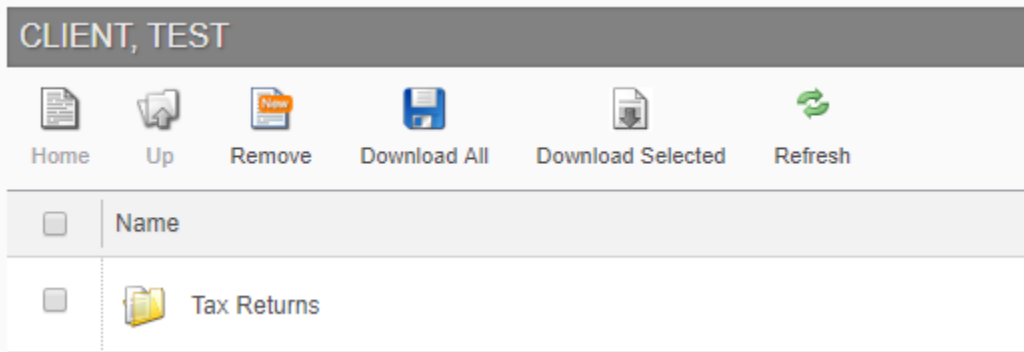


We receive an email notification when you drop something in your portal, you too will receive an email notification if your tax return is added. However, if you accountant uploads something to your portal they will call or email you as you will not automatically receive a notification.

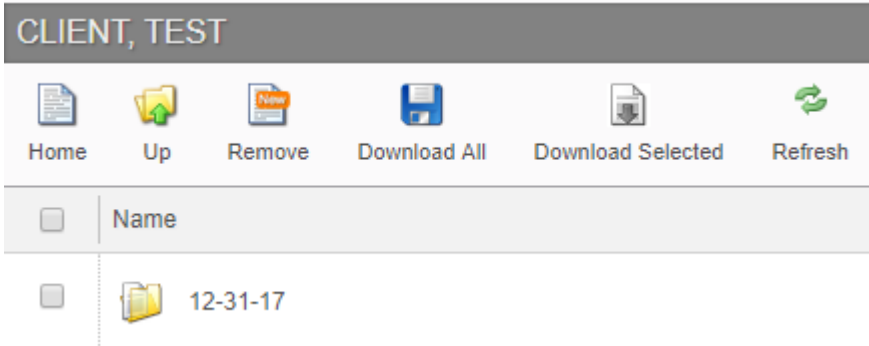
Your Taxes, for instance, (if you choose to have them delivered to your portal) will show up below the File Exchange folder. The file will be your name in ALL CAPS.



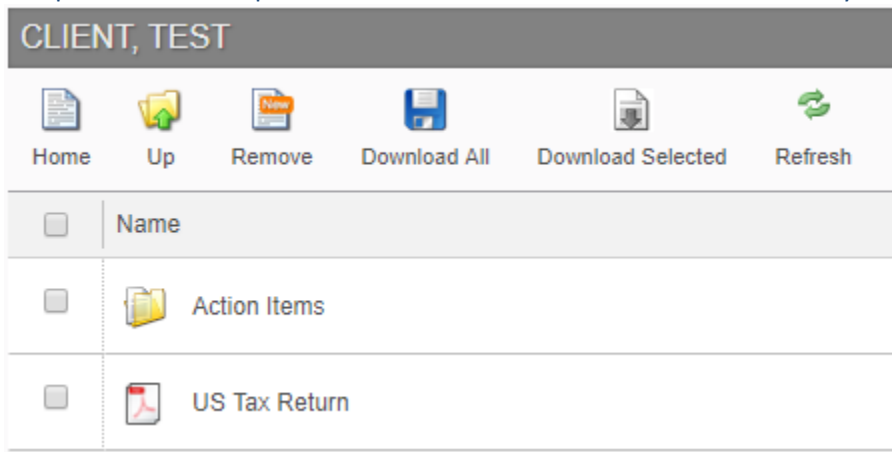
Double click on this file and your tax folder will appear in the right hand window



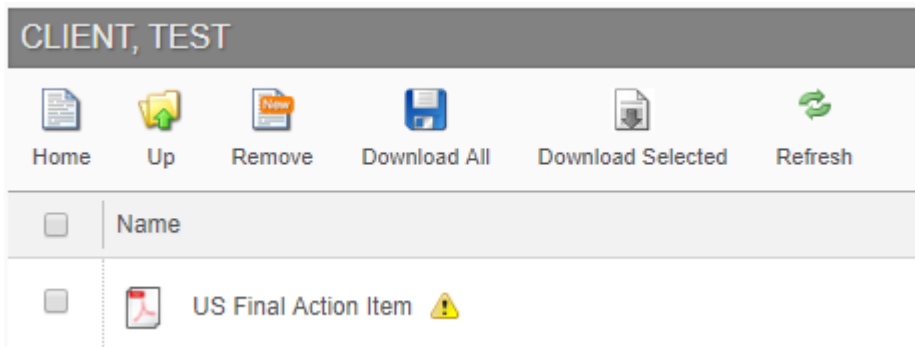
Click once and they will show up by year.



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.



Actions 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!!!