HUTCHINSON and BLOODGOOD LLP
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

# Client Portal

# User Guide

March 2011

## Introduction

Welcome to the Hutchinson and Bloodgood Client Portal. The purpose of this portal is to provide you with a convenient and secure method of exchanging documents with us. We also want to give you access to other information that may be of interest to you.

It also allows a reduction in environmental waste by allowing us to exchange files electronically instead of via paper (e.g., less use of paper and less vehicle emissions to have documents delivered). Unlike emails and their attachments, our Client Portal uses encryption technology so both you and we will have confidence knowing that your information is secure when transferred back and forth.

## System Requirements

To access the Portal, you need high-speed internet access. You will also need one of the following browsers:

Internet Explorer (version 7.0 or higher), Apple Safari (4.0 or higher), Mozilla Firefox, or Google Chrome

You will also need to have Adobe Acrobat Reader installed on your computer if you will be exchanging PDF (Portable Document Format) documents with us. If you do not have Acrobat, it is available at no charge from Adobe at:

http://get.adobe.com/reader

If we are also exchanging files such as Microsoft Word or Excel files, you will need to have software on your computer that will open these. Microsoft Office is available at many convenient retail locations. A free MS Office compatible office productivity suite can be found at:

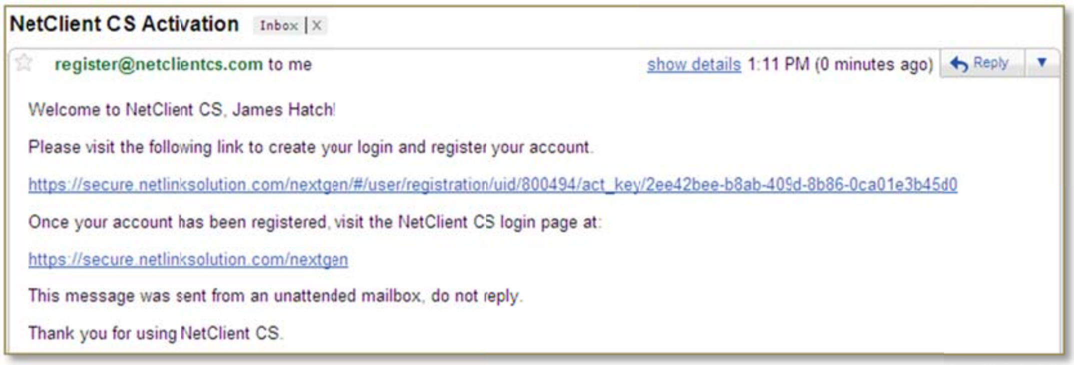
http://download.openoffice.org

## Accessing and Using Our Portal

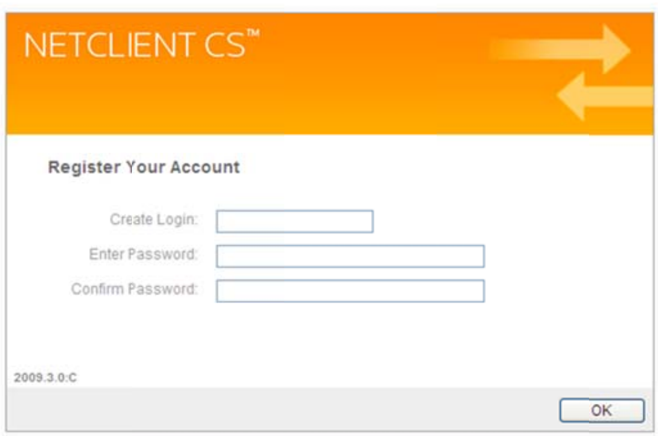
Below are step-by-step instructions on using our portal, and the two document management modules – ClientFlow and File Exchange. The images used in these instructions are for illustrative purposes only and may be slightly different than what our portal looks like. Note – only the ClientFlow portion of the portal has been implemented. We anticipate the addition of File Exchange in the summer of 2011. References to File Exchange in this manual will be augmented at that time.

To access our portal, we must first create an account for you. Please either contact our Partner that provides your services, send an email to webmaster@hbllp.com, or fill out and submit the electronic form whose link you will find on the same page that you downloaded these instructions from. You will then receive a registration email from register@netclientcs.com. It is very important that you actively look for this email, as your email program may treat this email as a spam or junk email. In the email, it will contain a link (or URL address to copy and paste into the browser) that will take you to a page to create a login and register your account. If you cannot locate the registration email then contact us and we can resend the registration email.

**Sample Portal Activation Email**




1. Once the email has been received go to the registration website and follow these steps:
   a. Enter a login in the Create Login field (Note: Use your email address as your login to make it easier to remember)
   b. Enter a password in the Enter Password field (see password requirements below)
   c. Re-enter the password in the Confirm Password field

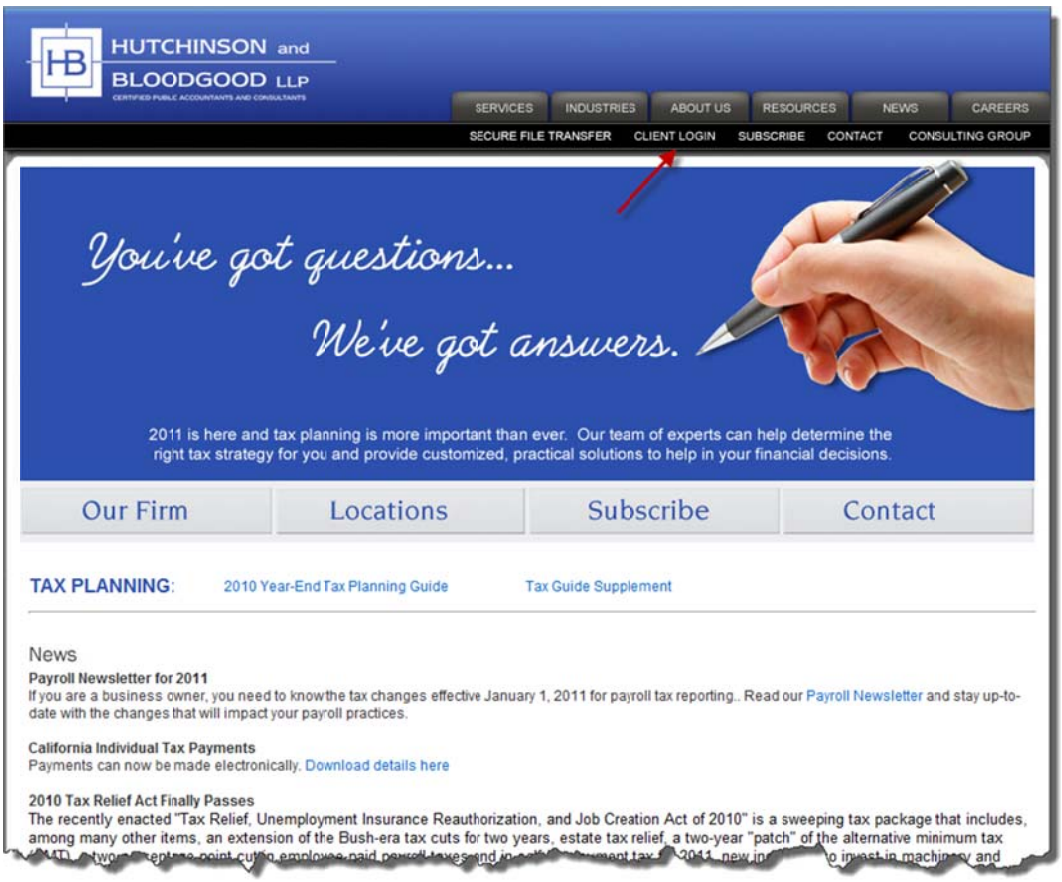



**Important Information about your Login and Password**

- The password must be at least seven (7) characters long and must include letters and numbers (e.g. **password1**). You can also user symbols (e.g., %, $, #)
- Passwords are case sensitive (e.g. **P**ass**W**ord1)

- Users will be required to change their Passwords every 90 days for security purposes. Passwords cannot be reused for 9 cycles.
- If you forgot your password, you can request to have a new temporary password emailed to you.
- If ten consecutive, unsuccessful attempts are made to log in to an account, the login for that account is locked. An email message will be sent automatically to the email address assigned to the login; the email message notifies the user of the unsuccessful login attempts and provides a link to unlock the login immediately. The account will be unlocked when the user clicks the link within the email message or when the lock expires after 30 minutes.

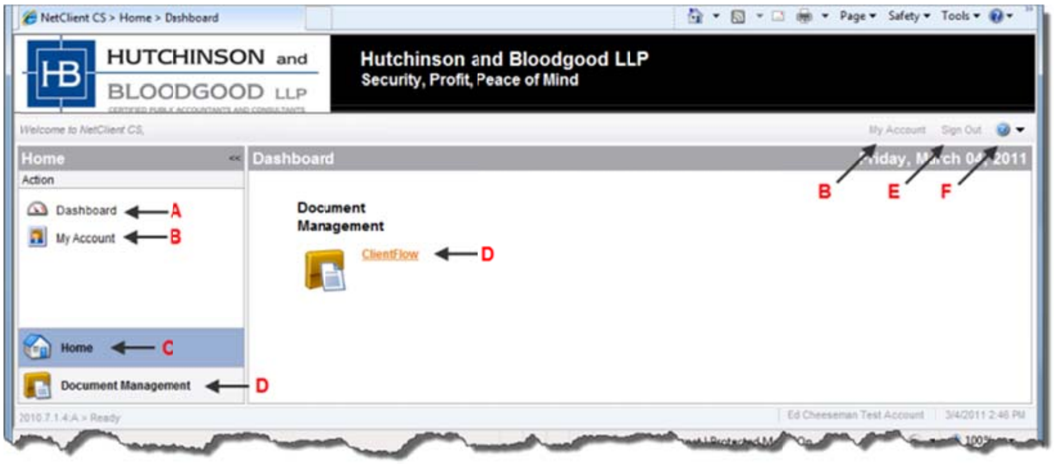
**Note:** For future access and to login to our portal after this initial login, visit our web site and select the “Client Login” option.




2. After successfully registering your portal account, confirm that your login is in the Login field and enter your password that you just created and click on the Login button.

   **Note**: After logging in, the portal, a Home or Dashboard page will be displayed listing Document Management and the ClientFlow and/or File Exchange modules. Also, Security Questions can be setup to simplify password resets if you should forget your password.  We ask that you please set up the Security Questions – it will make it much easier to help you if you forget your password.

## Portal Navigation Features




**A. Dashboard** – Allows you to view all applications you have access to in the portal.

**B. My Account** – Allows you to view and update your Login, Name, Email Address, Password and Security Questions

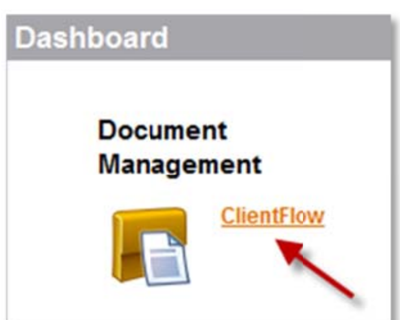
**C. Home** – Allows you to return back to the Home view of the Dashboard to view all applications.

**D. Document Management** – Allows you to view all Document Management applications they have access to in – ClientFlow or File Exchange.

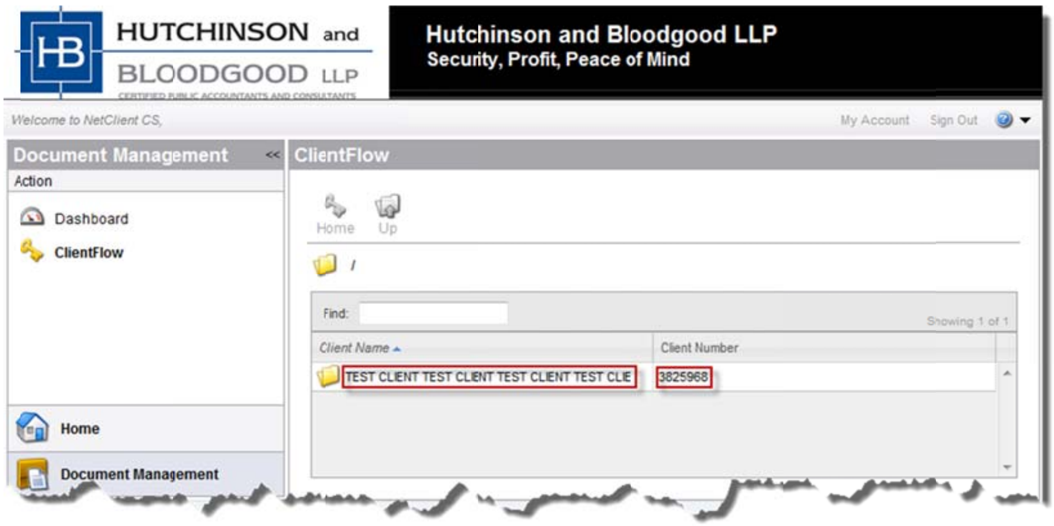
**E. Sign Out** – Allows a user to sign out and end their session.

**F. Help Menu** – Provides a menu of help topics for using the portal.

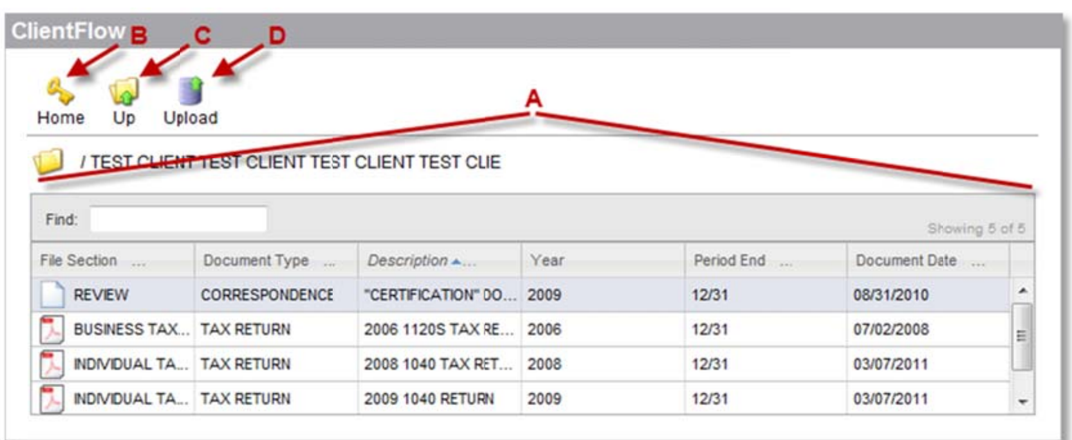
3. Click on ClientFlow to open the application.



4. Click on the Client Name or Client Number to see any documents in the folder. Note that you may have more than one "Client" with us. For example, if we perform work for both you as an individual and your business, we could have separate numbers for each one.




## Navigation within ClientFlow




**A. Document Index Value Columns** – Allows you to view the index values that we've given to each document. Each column can be re-sized by clicking and dragging its border. **Documents can be sorted by each column by clicking the column header.**

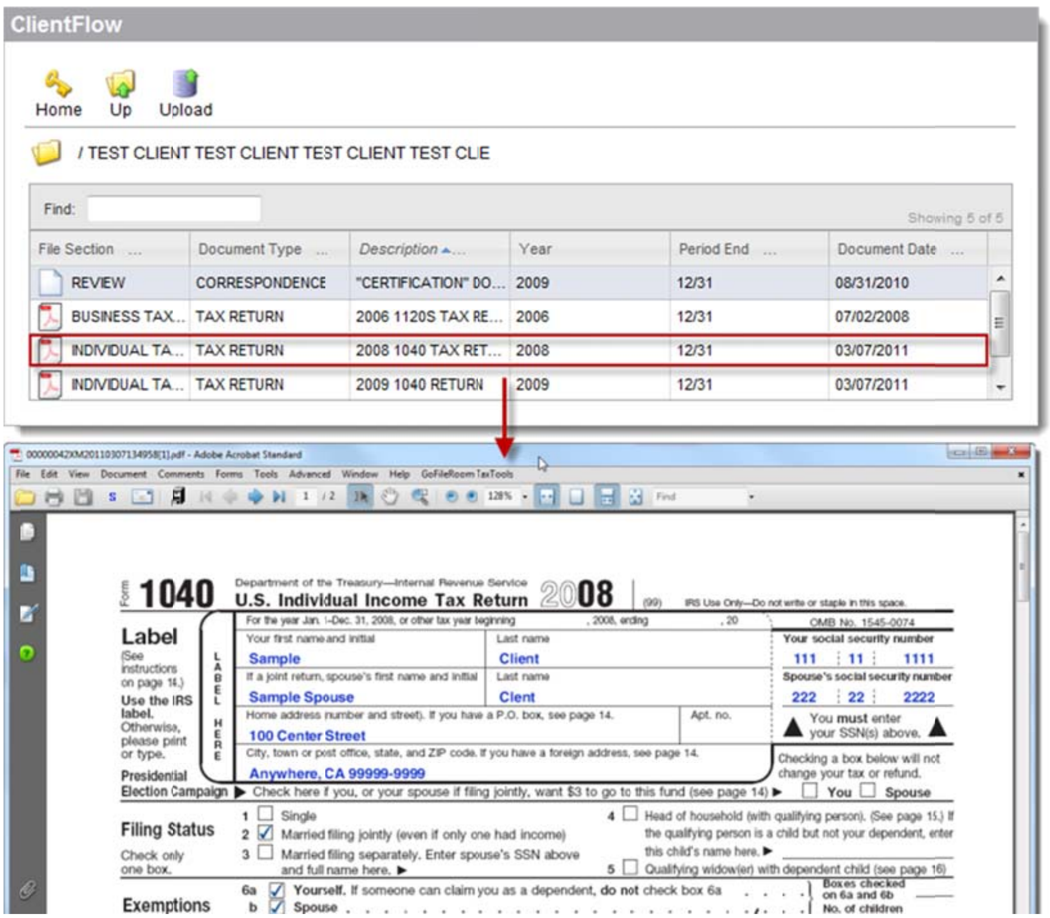
**B. Home** – Allows you to return back to the list of Client Names and Client Numbers for which you can see published documents.

**C.** **Up** – Allows you to go "up" one level in the portal.  From here it works the same as the "Home" button.

**D.** **Upload** – Allows you to upload a document to us through ClientFlow.

**Note:** No documents will appear if we have not published any documents to the portal for you to view, or you have not recently uploaded any documents to us.

5. Click on any document in the list to open the document up in view mode (i.e., read-only mode).

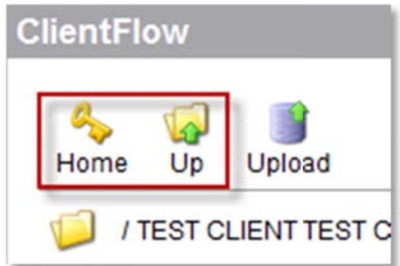



**Note**: Documents opened from ClientFlow are **READ-ONLY** and therefore cannot be edited and saved back to ClientFlow.  If the document requires editing, save a copy to your local drive (File / Save As), edit it as necessary, and then upload it back to the portal (uploading is discussed in the next steps).

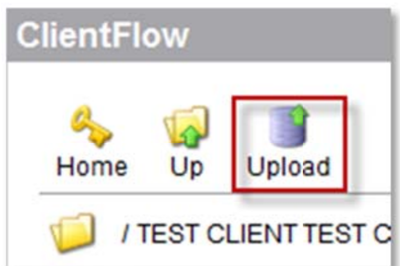
**Note**: To view a document from ClientFlow, it requires the necessary software application to open and view the document.  For example, if a document is a Microsoft Word file, you will need to have Microsoft Word installed to your local computer to open and view the document.  See *"System Requirements*" above.

6. Click on the  in the upper right hand corner of the window to close the document after viewing it.

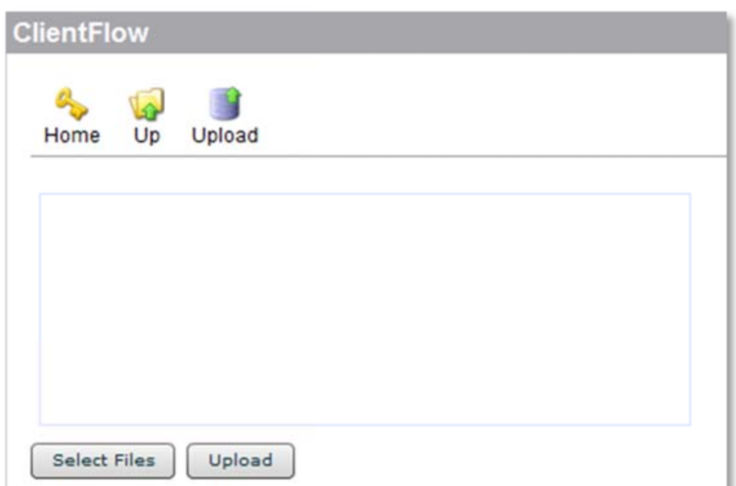
7. Click on HOME or UP icons, to return back to the list of Client Names and Client Numbers for which you can see published documents for.




8. To upload a document into ClientFlow, select a client from the list and then click on Upload.

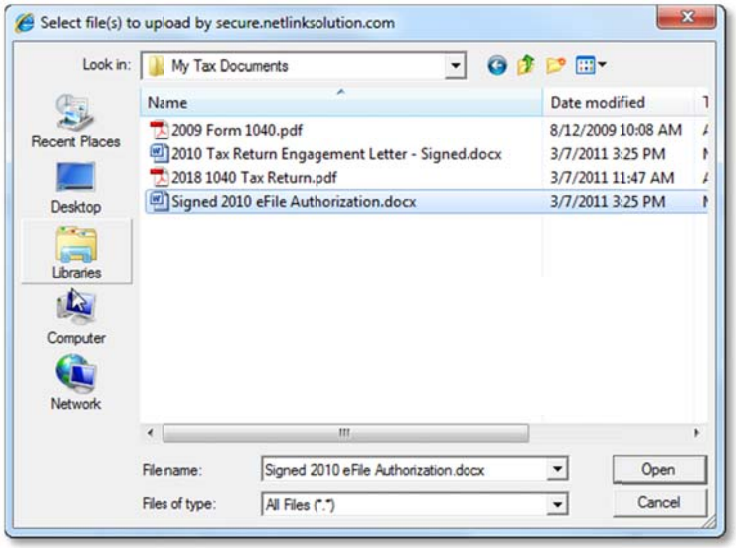



9. Click on the Browse button to search for the document you want to upload to ClientFlow.

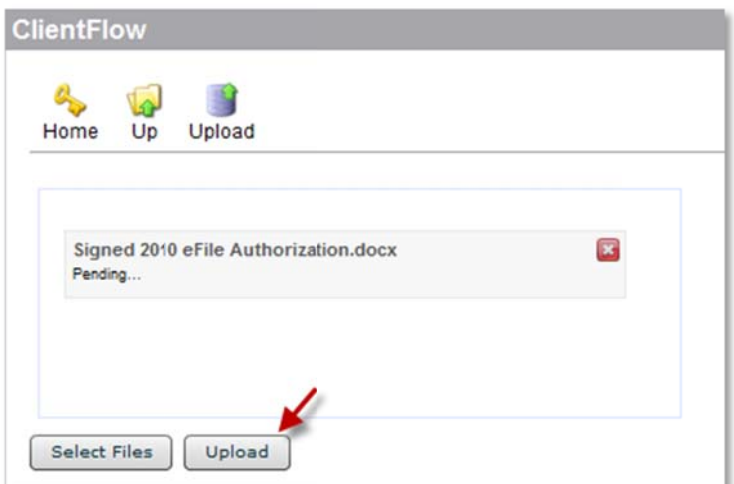



**Note**: If you do not want to upload a document, click the Close button to close the upload option.

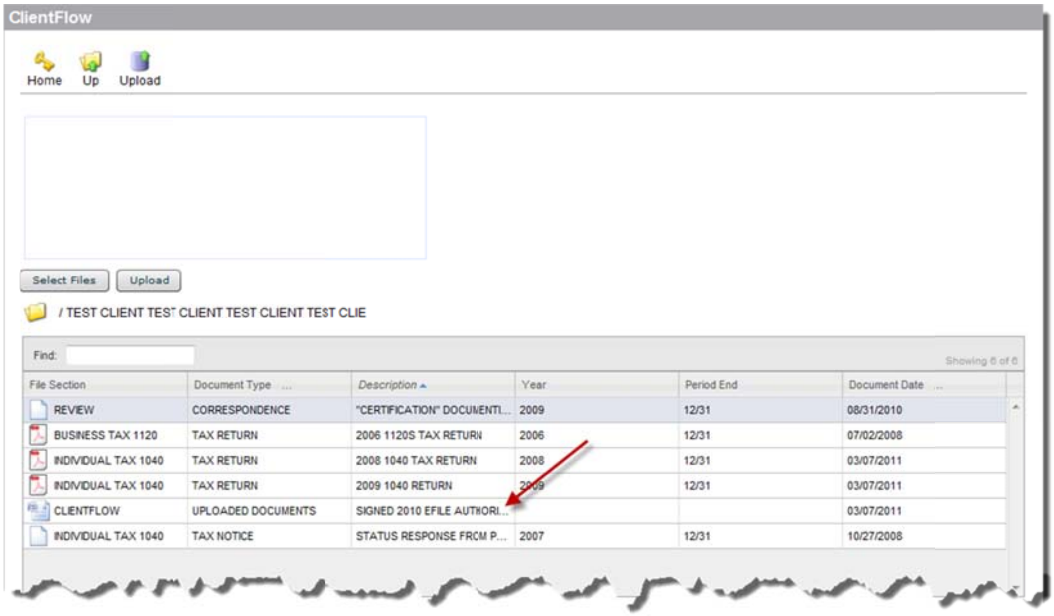
10. In the Select Files(s) to Upload window, find the document you want to upload, select it and click on the Open button.




11. Click on the Upload button to upload the file to our portal and make it viewable by us.



**Note:** After the document has been uploaded, the document will become viewable in your list of documents in the portal. This feature provides you a record of the documents you uploaded to us and assures you that the upload was successful. Your name for your document becomes the description of the document within the portal.



12. After viewing or uploading documents, click on Sign Out to end your session.

## Important Information about Documents Uploaded through ClientFlow in the Portal

- Any type of document or file can be uploaded with ClientFlow and viewed in its native format except for TIFF files.
    - o TIFF files will be converted to PDF files after upload.

- Approximately 400 MB is the maximum file size that can be uploaded through the ClientFlow module at one time.
    - o A portal session may time-out if the Internet connection is not fast enough to completely upload the document(s) within 3 hours.

- Individual documents or files can be uploaded to the portal one at a time. Multiple documents/files may be uploaded at one time if they are located in a single ZIPPED (compressed) folder.

- We MAY NOT be automatically notified when you upload a document through the portal. Please contact us to let us know when documents have been uploaded.