

Client Portal Tips & Tutorials

Introduction Guide to Portal

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Introduction to Client Portal

This Guide is designed for Heffler, Radetich & Saitta LLP's clients who will have access to the document management module in the Client Portal. The Client Portal is an extension of our firm's website and provides a solution for us to share and exchange electronic documents securely and quickly. It also allows a reduction in environmental waste by corresponding electronically instead of handling paper (e.g., less use of paper and less vehicle emissions to have documents delivered). Unlike emails and their attachments, the Client Portal uses encryption technology so you and Heffler, Radetich & Saitta LLP will have confidence knowing that the information is secure when transferred back and forth.

Heffler, Radetich & Saitta LLP will grant you permission to access a portal document management module – either **ClientFlow** or **File Exchange**, or possibly both. ClientFlow interacts directly with the firm's document management system, which allows for a fast and convenient exchange of documents and information between you and Heffler, Radetich & Saitta LLP. File Exchange is also a fast and convenient way to exchange documents and information between you and our firm, and has additional features that you can use, such as, a Private vault to save your most important documents to. **Heffler, Radetich & Saitta LLP will direct you on which document management module to use in regards to uploading specific documents and files.**

System Requirements for using the Document Management Module in the Client Portal

To access and use the Client Portal, you need high-speed internet access. Also, Client Portal and the ClientFlow Document Management Module require:

- Internet Explorer (version 7.0 or higher) web browser
- A Microsoft windows-based PC operating Windows XP or newer

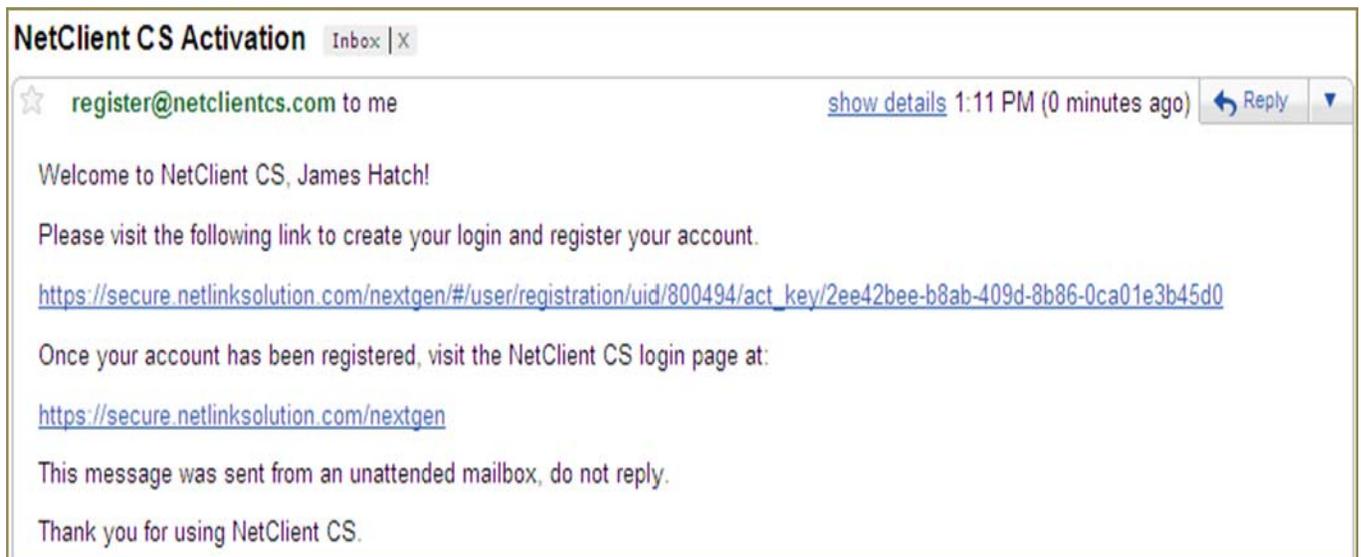
For more information on these system requirements or assistance with meeting these requirements, please contact your Heffler, Radetich & Saitta LLP Client Service Representative: 215-665-8870.

Accessing and Using Client Portal

Below are step-by-step instructions on using Client Portal, and the two document management modules - **ClientFlow** and **File Exchange**. The images used in these instructions are for illustrative purposes only and will be slightly different than the actual Client Portal website you will access.

To access Client Portal, Heffler, Radetich & Saitta LLP will create an account for you. 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 the firm and they can resend the registration email.

Sample Client 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

NETCLIENT CS™

Register Your Account

Create Login:

Enter Password:

Confirm Password:

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OK

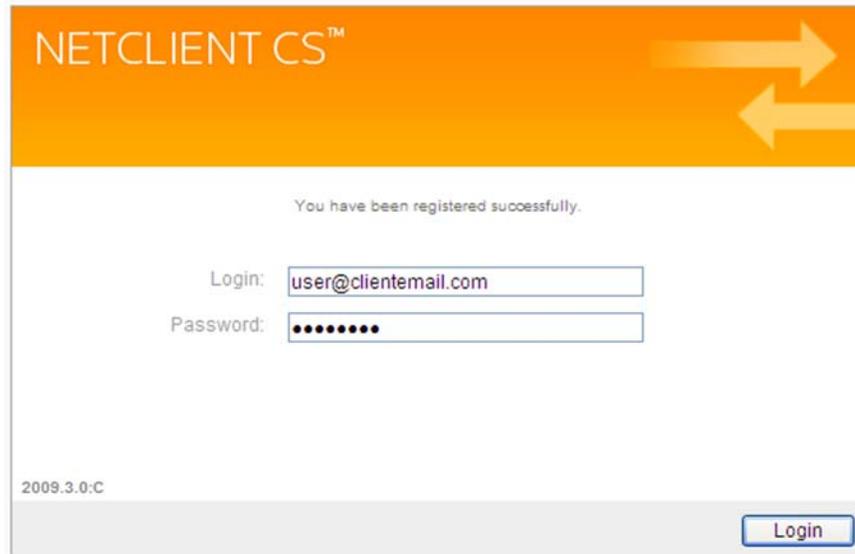
Important Information about your Login and Password

- The password must be at least seven (7) characters long and must include letters and numbers (e.g. **password1**). You can also use symbols (e.g., %, \$, #)
- Passwords are case sensitive (e.g. **PassWord1**)
- 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.

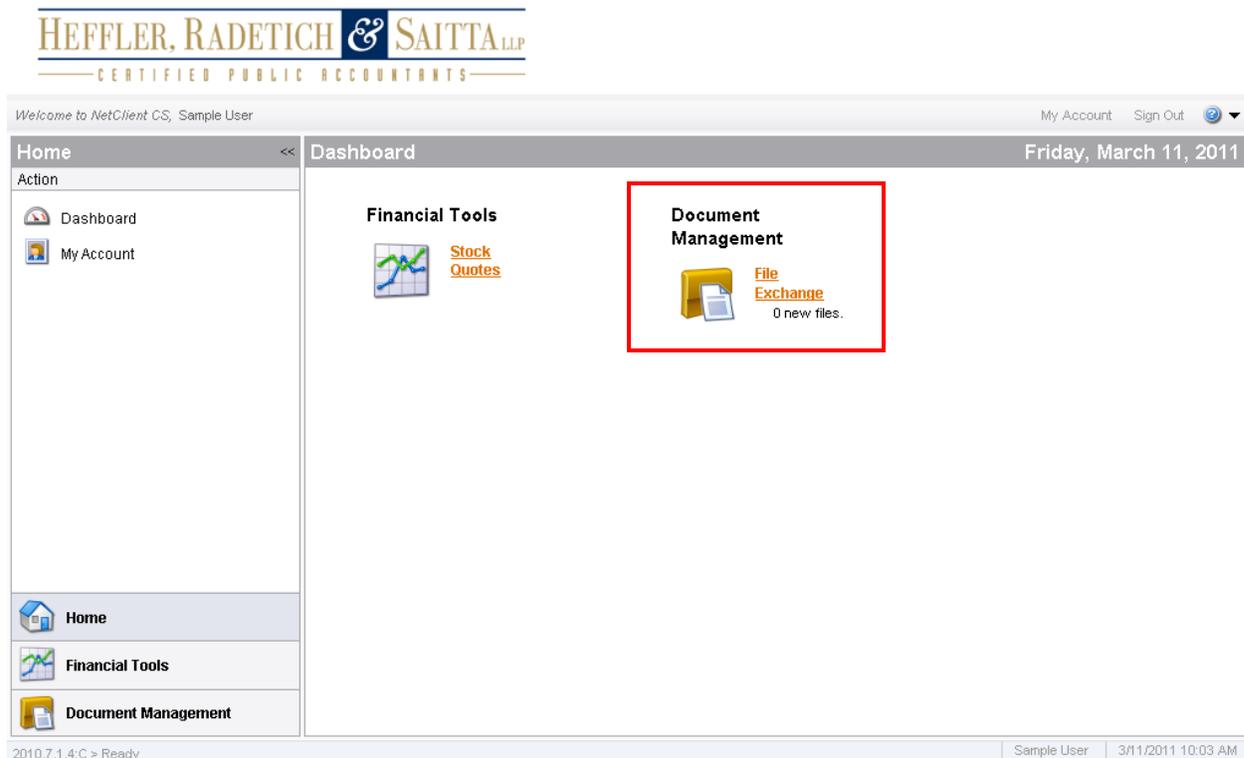
Note: If you have any questions or issues with accessing your Client Portal user account, contact your Client Service Representative at Heffler, Radetich & Saitta LLP.

Note: For future access and to login to Client Portal after this initial login, visit Heffler, Radetich & Saitta LLP's website, or save the login site for Client Portal as a Favorite in your browser.

2. After successfully registering your Client 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 Client Portal 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.



Contact Information for Support of Client Portal

Your **Client Service Representative** is the Partner or Principal-in-Charge of your Engagement

Main Phone: 215-665-8870



Connecting Clients to Greater Goals