



# Client Portal NetClient CS Solution

User Guide



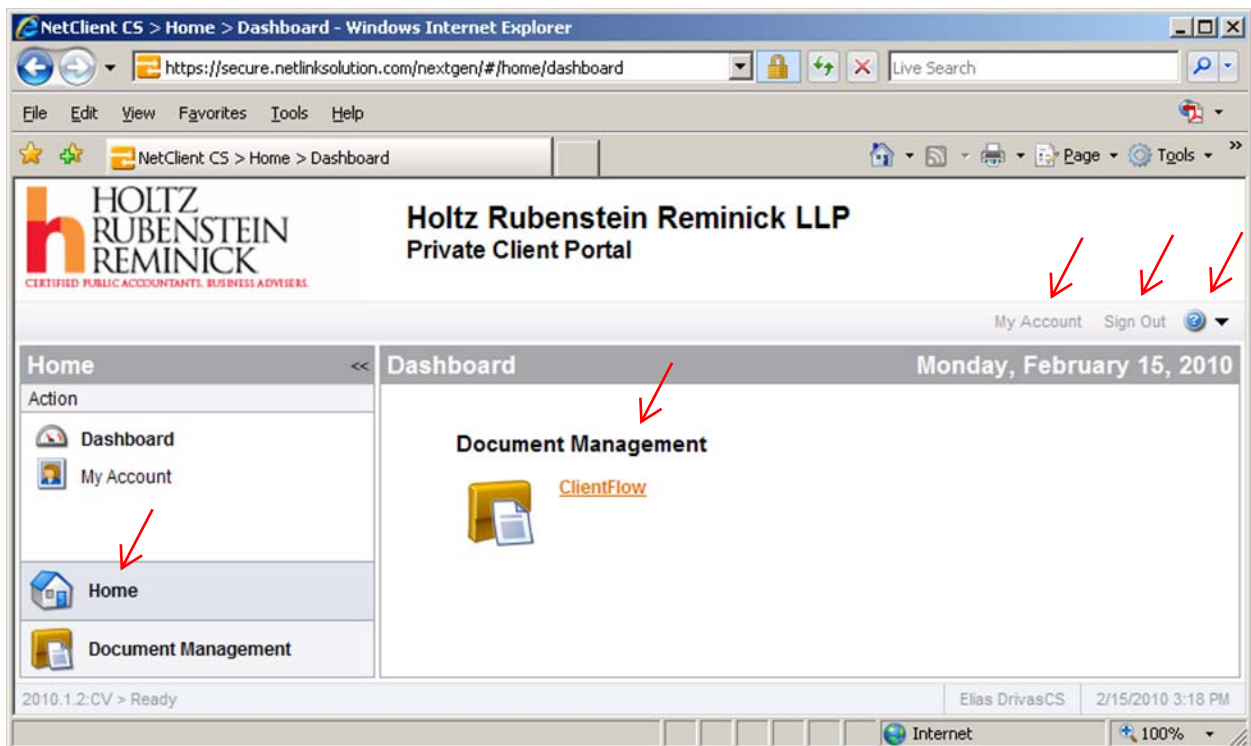
## Using the HRLLP Client Portal – NetClient CS Solution

Please note: Online, self-paced learning tutorials can be found on our website at <http://www.hrrllp.com>  
Click on the “Client Portal” link and review the “Tips and Tutorials” section.

The Home page of the HRLLP Client Portal solution provides you with the features/options listed below:

- **My Account** – Allows a user to view and update their Login, Name, Email Address and Password
- **Sign Out** – Allows a user to sign out and end their session of the Client Portal
- **Help Menu** – Provides a menu of help topics for using the Client Portal
- **Document Management / ClientFlow** – Allows a user to view all Documents they have access to
- **Home** – Allows a user to return back to the Home view of the Client Portal

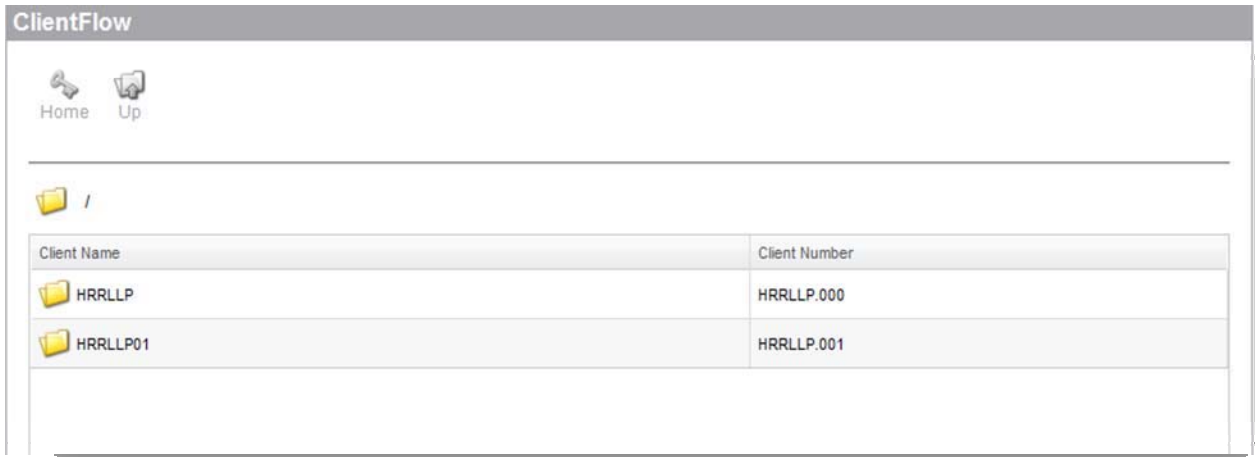
See image below.



## Accessing Documents

In order to access document(s) available for your review, click on the ClientFlow link. Depending on the number of accounts with the firm and permissions set by the Portal Administrator, one or more client

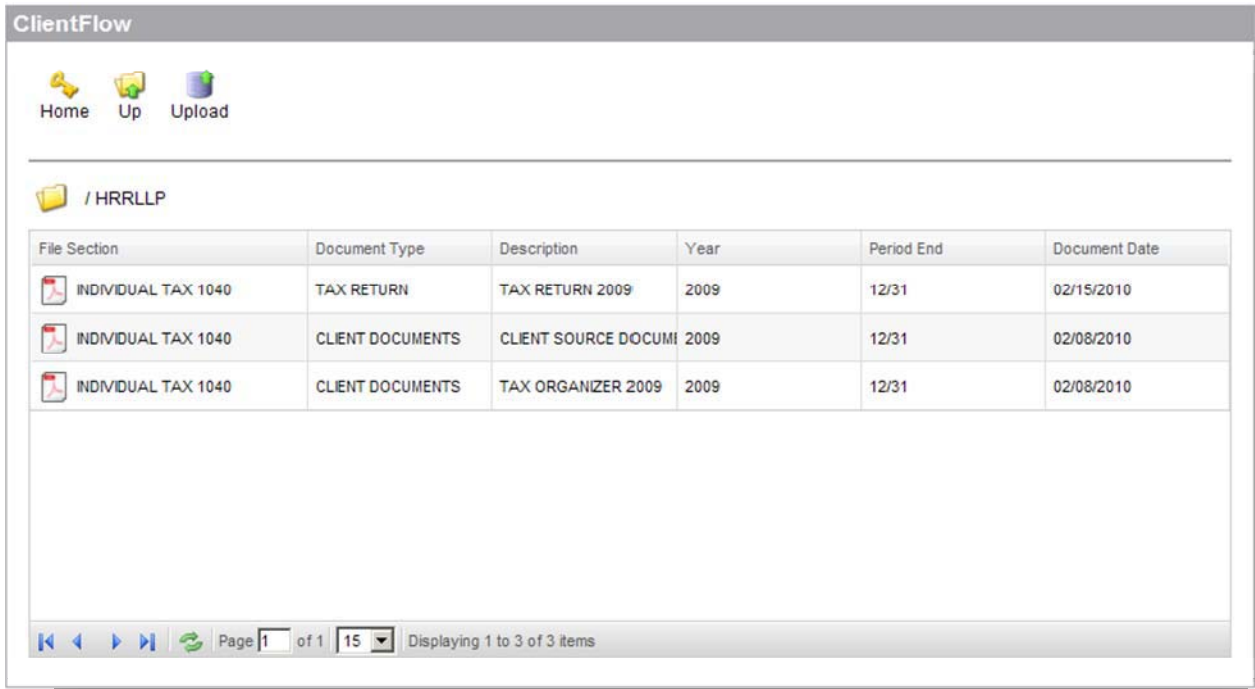
accounts may appear. Click on the desired client account.



The screenshot shows the ClientFlow interface. At the top, there are navigation icons for Home and Up. Below that, a breadcrumb path shows a folder icon followed by a slash. The main content area contains a table with two columns: Client Name and Client Number.

Client Name	Client Number
HRLLP	HRLLP.000
HRLLP01	HRLLP.001

A list of documents will appear if documents have been made available for your review or you have recently uploaded a document. See image below.

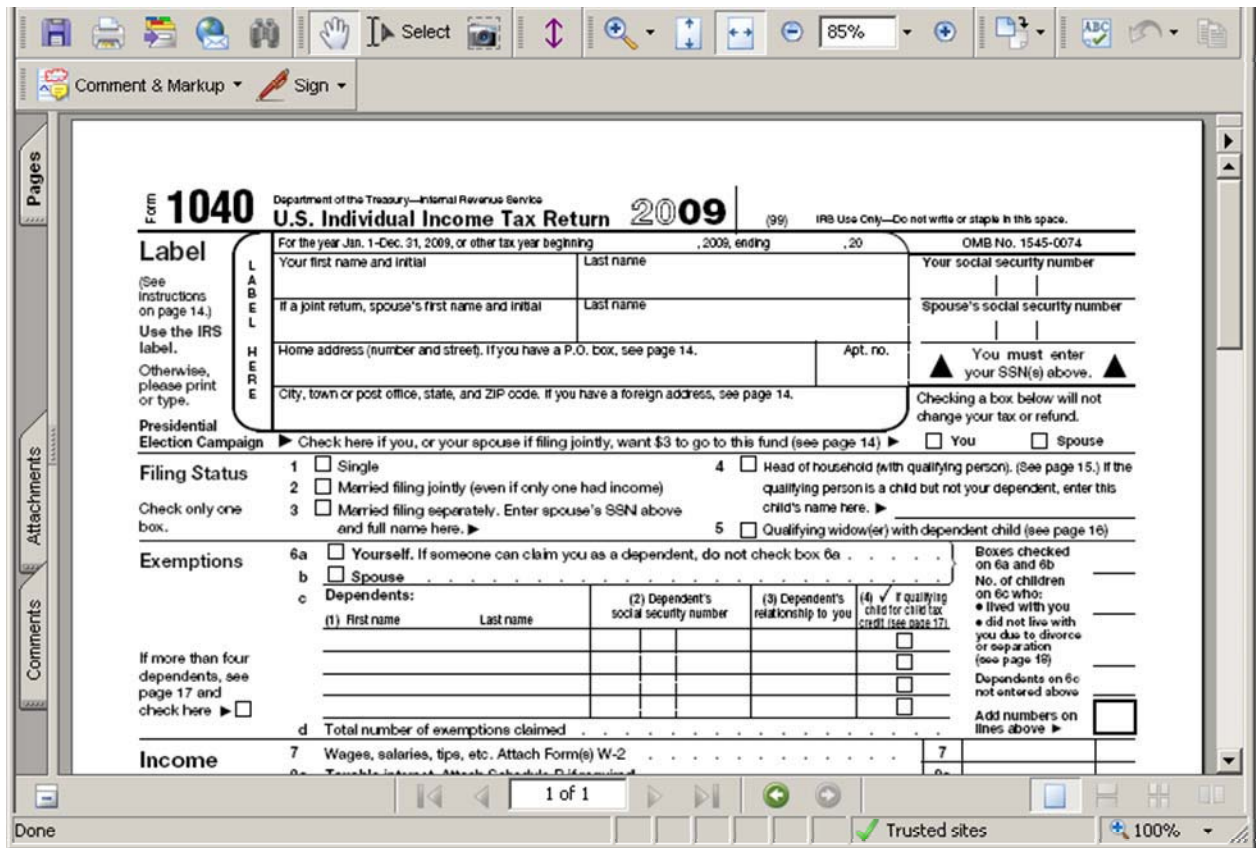


The screenshot shows the ClientFlow interface with a document list. At the top, there are navigation icons for Home, Up, and Upload. Below that, a breadcrumb path shows a folder icon followed by a slash and the client name HRLLP. The main content area contains a table with six columns: File Section, Document Type, Description, Year, Period End, and Document Date.

File Section	Document Type	Description	Year	Period End	Document Date
INDIVIDUAL TAX 1040	TAX RETURN	TAX RETURN 2009	2009	12/31	02/15/2010
INDIVIDUAL TAX 1040	CLIENT DOCUMENTS	CLIENT SOURCE DOCUMENT	2009	12/31	02/08/2010
INDIVIDUAL TAX 1040	CLIENT DOCUMENTS	TAX ORGANIZER 2009	2009	12/31	02/08/2010

At the bottom of the interface, there is a pagination control showing "Page 1 of 1" and "15" items, with a note "Displaying 1 to 3 of 3 items".

Click on any document in the list to open the document up in view mode.



**Please note:**

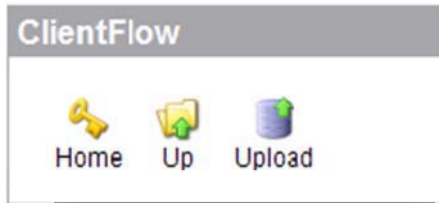
- Documents open from the Client Portal are READ-ONLY and therefore cannot be edited. If a document requires editing, save a copy to the local computer (File > Save As), edit it as necessary and then upload it to the Client Portal as a new document.
- Adobe Reader is required at minimum in order to review documents. In some cases, Microsoft Office Word and/or Excel files may also be available for your review. In those instances the necessary software application must be installed in order for you to be able to view the document.

You can download Adobe Reader by going to <http://www.adobe.com>

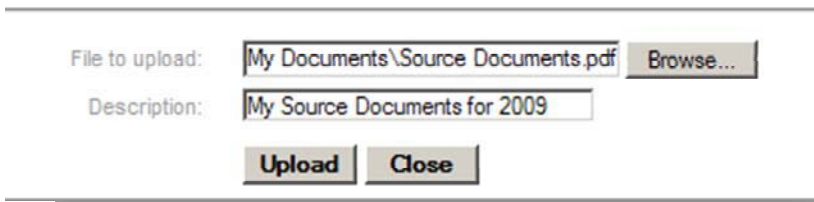
## Uploading Documents

The Upload feature allows you to send documents to your HRR Tax Advisor using encryption technology to protect your private information. Follow the steps below to upload a document into ClientFlow.

Click on the “Upload” option shown below.



Click on Browse and navigate through your files and select the file you wish to upload to the Client Portal and enter a Description.

A screenshot of a file upload dialog box. It has a white background and a grey border. At the top, it says "File to upload:" followed by a text box containing "My Documents\Source Documents.pdf" and a "Browse..." button. Below that, it says "Description:" followed by a text box containing "My Source Documents for 2009". At the bottom, there are two buttons: "Upload" and "Close".

Click on the “Upload” button. Click on the “Close” button to cancel the upload if necessary.

By default after a document has been uploaded it will become viewable under your list of documents in the Client Portal.

You can end your Client Portal session by clicking on the “Sign Out” option.

### **Please Note:**

- **You will be notified by your HRR tax advisor once a document is published to the client portal for your review.**
- **Documents of any type can be uploaded into the Client Portal.**
- **Tiff files will be converted to PDF files.**
- **400MB is the maximum file size that can be uploaded to the Client Portal at one time.**

- **Please contact your HRR Tax Advisor if you upload a document and time is of the essence.**
- **HRLLP determines which documents are published to the Client Portal and reserves the right to unpublish a document as necessary.**

If you have any questions, please contact the Portal Administrator by email at [portaladmin@hrllp.com](mailto:portaladmin@hrllp.com) or leave a voicemail at (646) 289-9004.