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Client Portal
NetClient CS Solution

User Guide

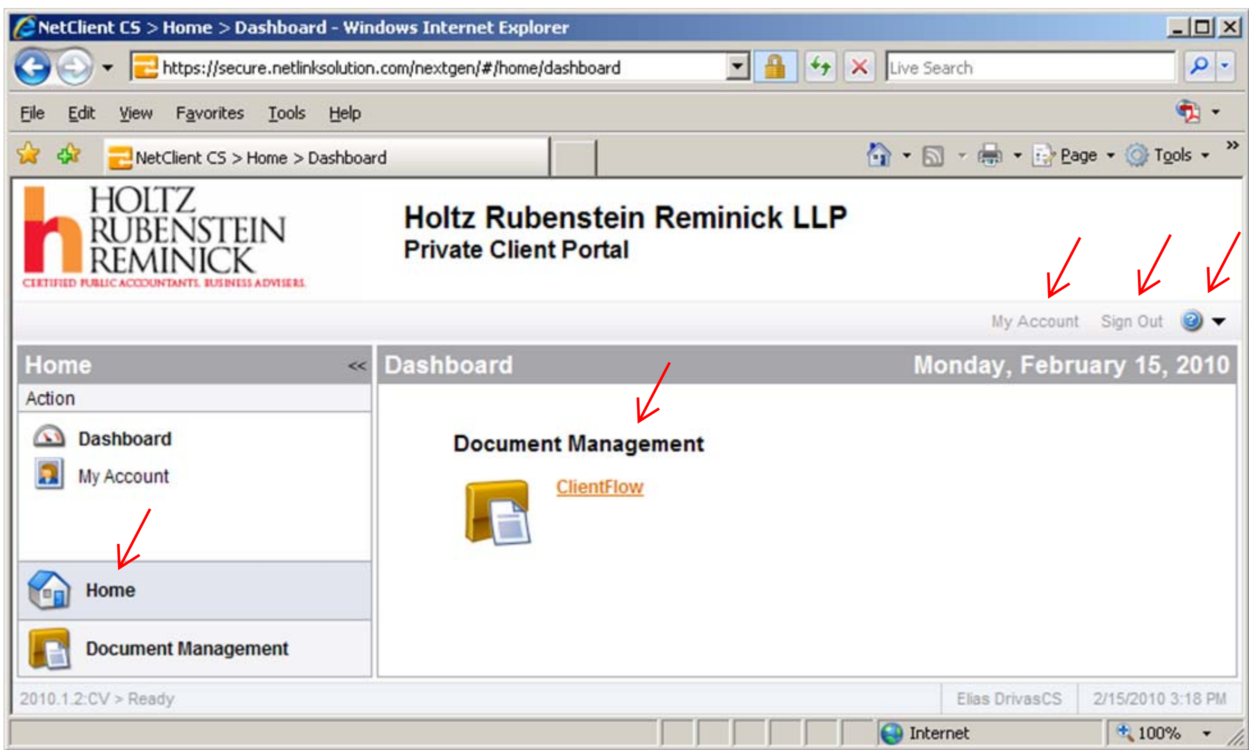
Using the HRRLLP Client Portal – NetClient CS Solution

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

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

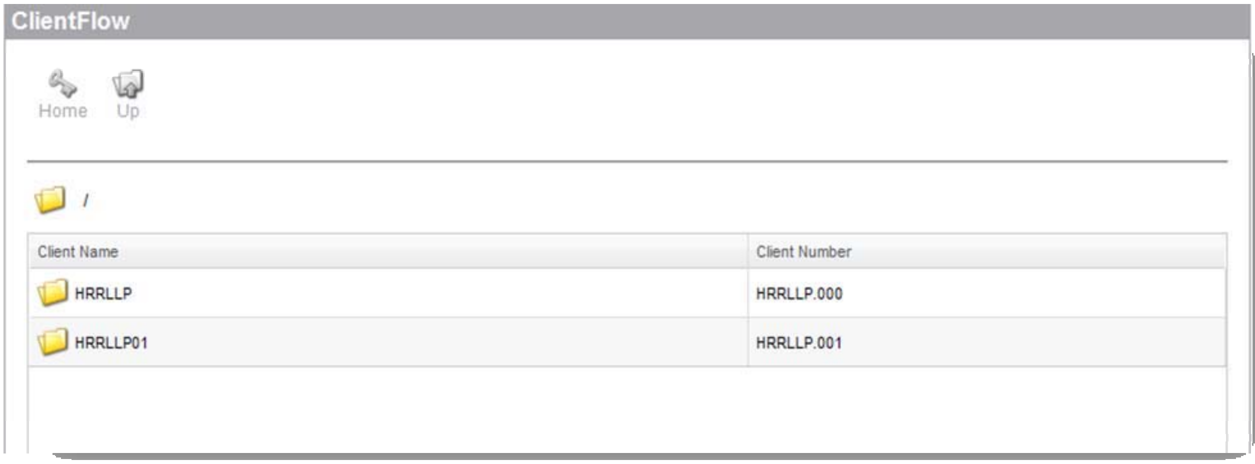
- **My Account** – Allows a user to view and update their Login, Name, Email Address and Password
- **Sign Out** – Allows a user to sign out and end their session of the Client Portal
- **Help Menu** – Provides a menu of help topics for using the Client Portal
- **Document Management / ClientFlow** –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

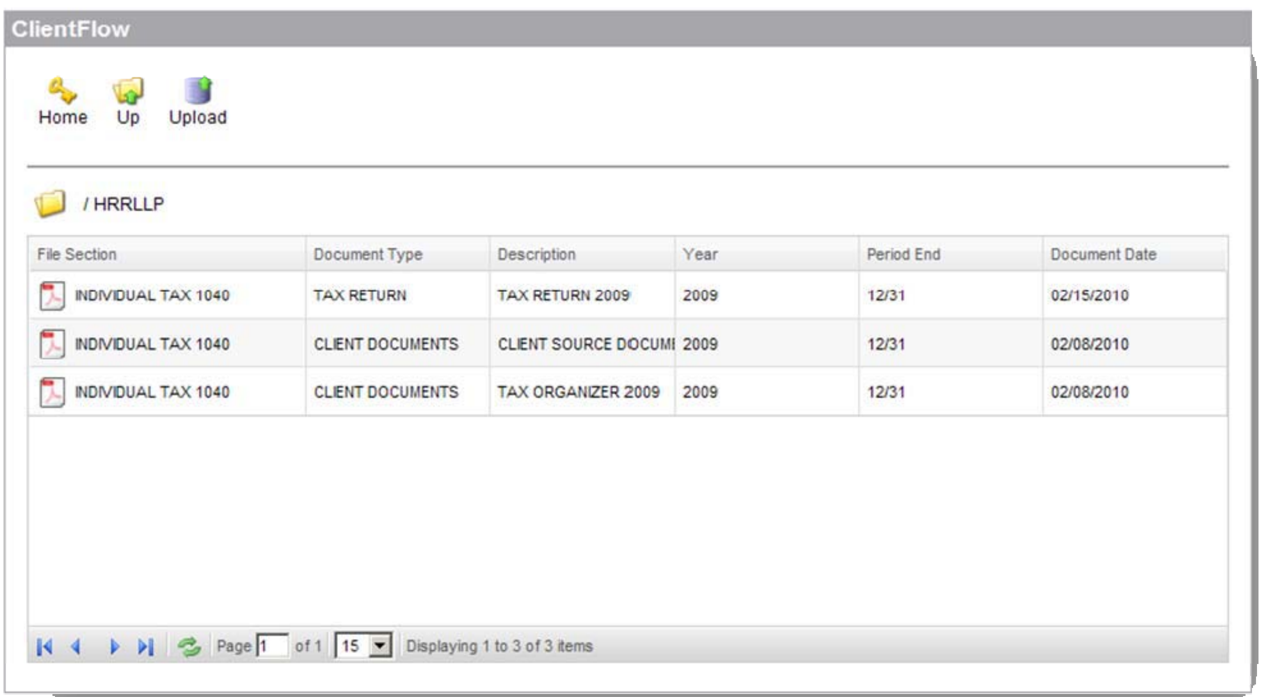


Accessing Documents

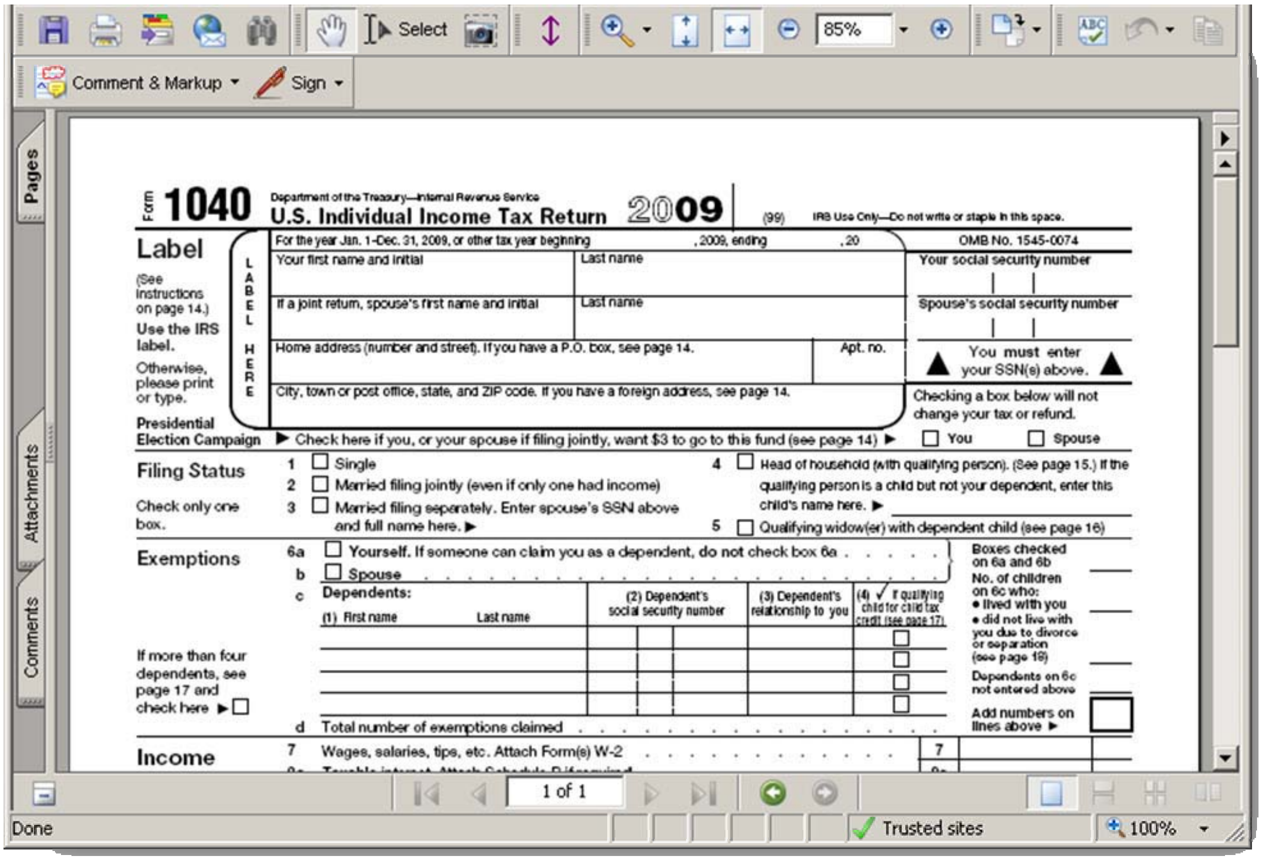
In order to access document(s) available for your review, click on the ClientFlow link. Depending on the number of accounts with the firm and permissions set by the Portal Administrator, one or more client accounts may appear. Click on the desired client account.



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.



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



Please note:

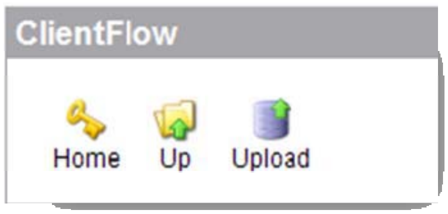
- Documents open from the Client Portal are READ-ONLY and therefore cannot be edited. If a document requires editing, save a copy to the local computer (File > Save As), edit it as necessary and then upload it to the Client Portal as a new document.
- Adobe Reader is required at minimum in order to review 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

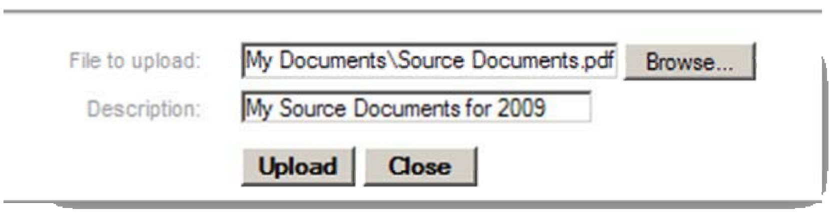
Uploading Documents

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.



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.**
- **HRRLLP 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@hrrllp.com or leave a voicemail at (646) 289-9004.