

DOCUMENT MANAGEMENT PORTAL USER GUIDE

Introduction to AHP's Client Portal

Andrews Hooper Pavlik PLC (AHP) uses a portal system designed and hosted by Thomson Reuters. The application is known as NetClient CS. This guide is designed for portal users who will have access to the ClientFlow module in the NetClient CS portal. The NetClient CS portal is an extension of AHP's website and provides a solution for AHP's clients 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 NetClient CS portal uses encryption technology so you will have confidence knowing that the information is secure when transferred back and forth.

System Requirements for using the NetClient CS Portal

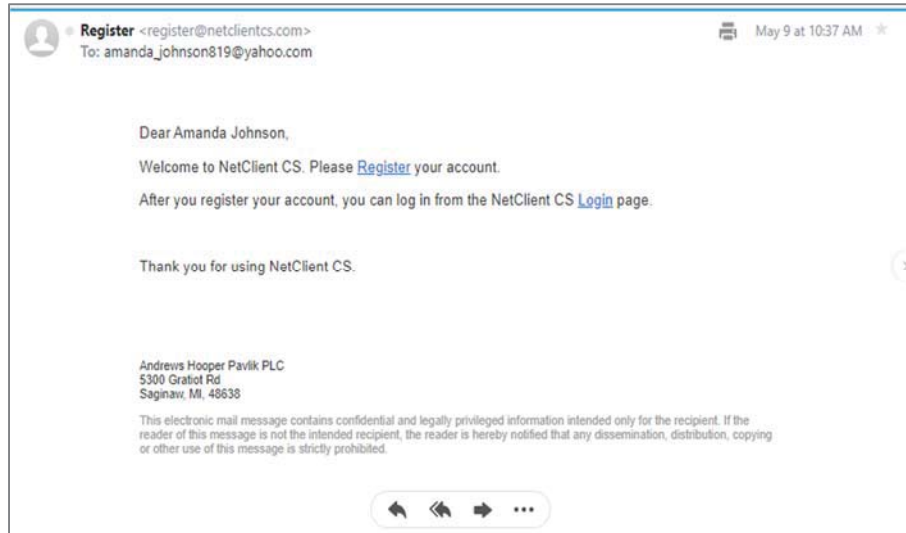
To access and use the NetClient CS Portal, you need high-speed internet access. NetClient CS is compatible with Microsoft Edge, Microsoft Internet Explorer 11, and the most current versions of Mozilla Firefox and Google Chrome. Also available through NetClient CS app on Apple and Android devices.

Accessing and Using AHP's NetClient CS Portal

Below are step-by-step instructions on using NetClient CS. The images used in these instructions are for illustrative purposes only and will be slightly different than the actual NetClient CS website you will access.

To access NetClient CS, AHP will create an account for you. You will then receive an email from register@netclients.com with the subject "Register your NetClient CS Account". The email will contain a link (or URL address to copy and paste into the browser) to create a login and register your account. If you do not receive an email, please check your spam folder and then contact AHP Portal Support at portal@ahplc.com or call 1-800-754-8477.

Sample Login Email:



1. Once the email has been received go to the registration website and follow these steps:
 - a. Enter your email address in the Create Login field
 - b. Enter a password in the Create Password field
 - c. Re-enter the password in the Confirm Password field
 - d. Click on Register

Welcome

Please register your account.

Create Login

Create Password

Confirm Password

Register

2. After successfully registering your NetClient CS account, confirm that your email address is in the Login field and enter your password that you just created and click on the Log In button.

AHPA
CPA & ADVISORS
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Secure Portal Login

Please log in.

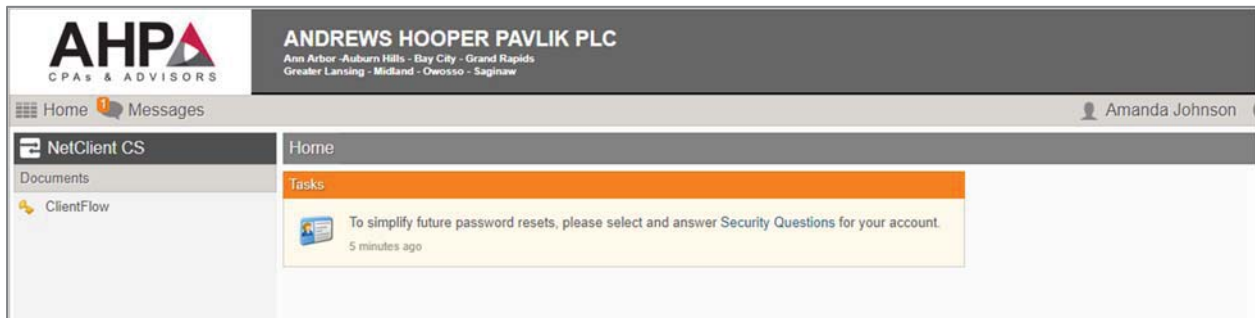
amanda_johnson819@yahoo.com

Password

Log In

Forgot password?

Note: After logging in, the NetClient CS Home page of your portal will be displayed listing ClientFlow in the Documents.



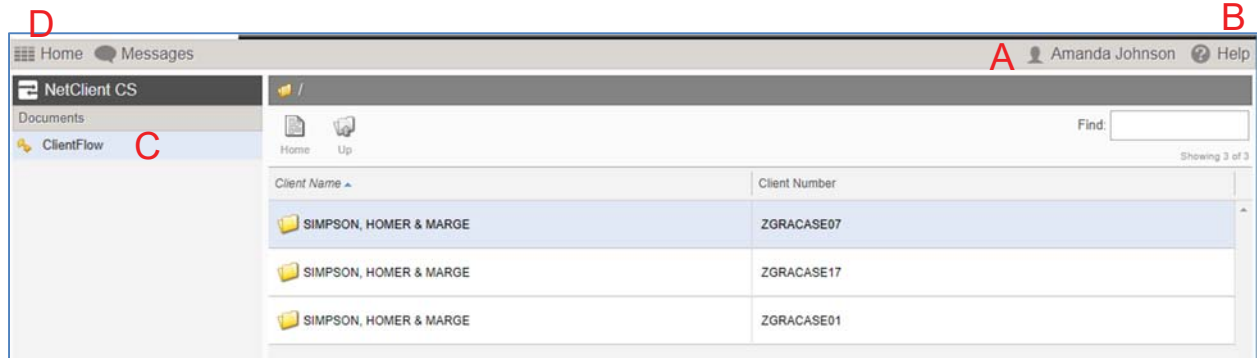
Important Information about your Login and Password

- The password must be at least eight (8) characters long and must include at least one uppercase letter and one lowercase letter, a number, and a non-alphanumeric character (e.g. **Password8!**)
- Users are encouraged to change their passwords periodically 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. You will need your login and email address to request a temporary password.
- If ten consecutive, unsuccessful attempts are made to log in to an account, the login for the account is locked. An email message will be sent automatically to the email address assigned to the login; the email message notified 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.

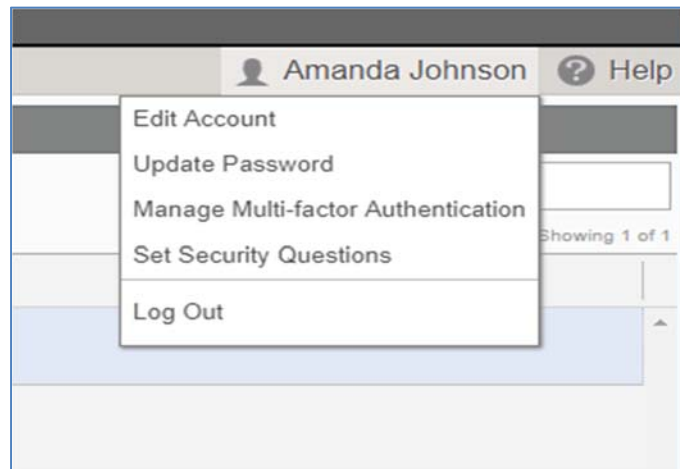
Note: If you have any questions or issues with accessing your AHP NetClient CS user account, contact AHP Portal Support at portal@ahpplc.com or call 1.800.754.8477.

Note: For future access and to login to AHP's client portal after this initial login, visit AHP's website (www.ahpplc.com) and click on "Client Portal" to reach the login page.

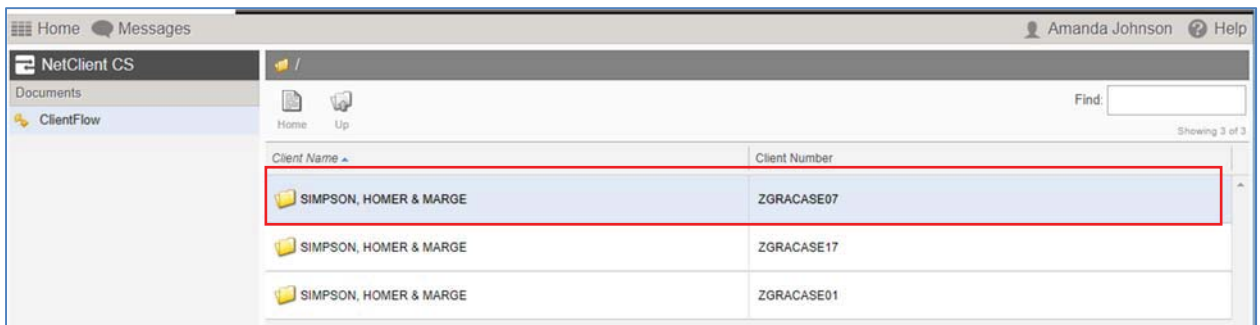
Navigation Features of NetClient CS



- A. **Your Name** - Allows a user to view and update their Login, Name, Email Address, Password, and Logout.



- B. **Help Menu** – provides a menu of help topics for using NetClient CS and ClientFlow.
- C. **ClientFlow** – Allows a user to view all Client Names and Client Numbers for which they have access to in NetClient CS.
- D. **Home** – Allows a user to return back to the Home view to view all applications.
3. Click on a Client Name or Client Number to see any documents for that client.



File Section	Document Type	Description	Year	Period End	Document Date
INDIVIDUAL TAX 1040	WORKPAPERS	BUSINESS AND RENTAL IN ...			01/27/2011
CLIENTFLOW	CLIENT UPLOADS	TEST.QBB			07/23/2014

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

	A	B	C	D	E	F
1	Consulting Business:					
2						
3						
4	Sales			20,000.00		
5						
6	Expenses:					
7						
8	Advertising		100.00			
9	Supplies		50.00			
10	Dues		60.00			
11	Meals		200.00			
12						
13				410.00		
14						
15	Consulting Business Income			19,590.00		
16						
17	Inventory @ 12/31/10			500.00		
18	Purchases			6,700.00		
19	Business Mileage			1,000.00		
20	Total Mileage			8,000.00		
21						
22	Rental Property:					
23						

Note: No documents will appear here if your firm has not published any documents to the NetClient CS portal for you to view, or you have not recently uploaded any documents.

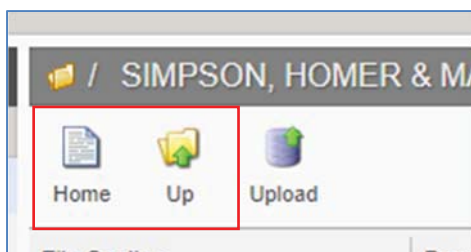
Note: Clicking on a header description will sort the documents. It is easier to find documents if you sort by Year, Document Date or Description.

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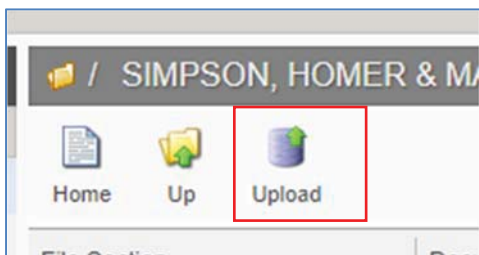
Note: Documents opened from the portal are **READ-ONLY** and therefore cannot be edited and saved back to the portal. **If the document requires editing**, save a copy to the local drive (File/Save As), edit as necessary, and then upload it back to the portal (uploading is discussed in the next steps).

Note: To view a document that is in the portal, it requires the necessary software application to open and view the document. For example, if a document in the portal is a Microsoft Word file, you will need to have Microsoft Word installed to your local workstation to open and view the document.

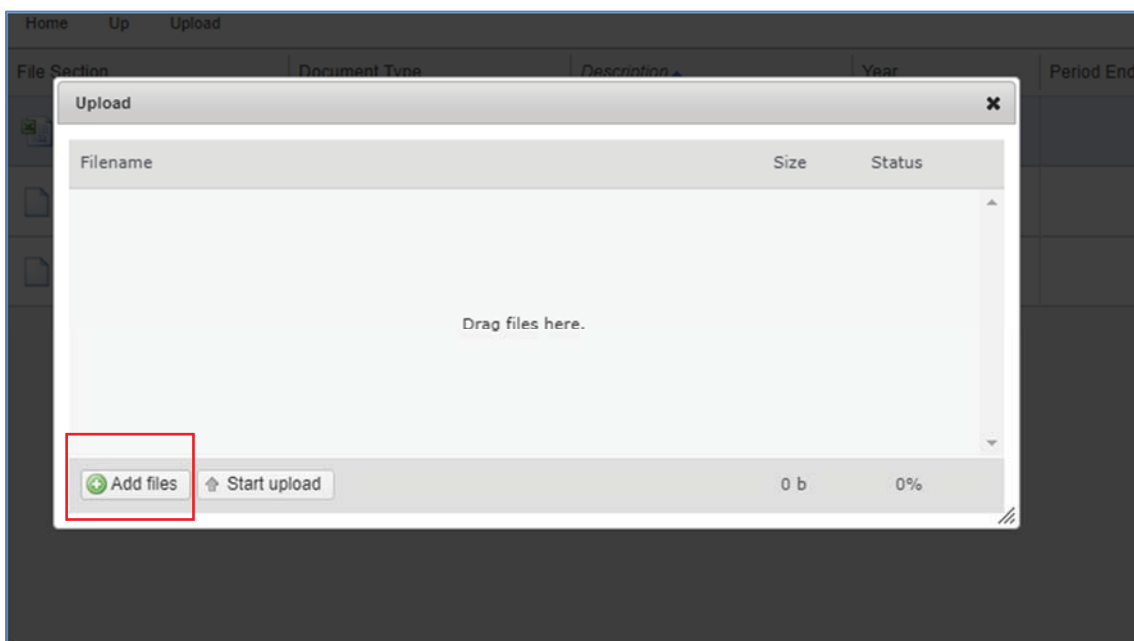
5. Click on the **X** in the upper right hand corner of the window to close the document after viewing it. Click on the **X** in the right hand corner of the TAB to close the internet window.
6. Click on Home or UP icons, to return back to the list of Client Names and Client Numbers for which you can see published documents for.



7. To upload a document into ClientFlow, select a client (the one you want to add a document to) from the list and then click on Upload.

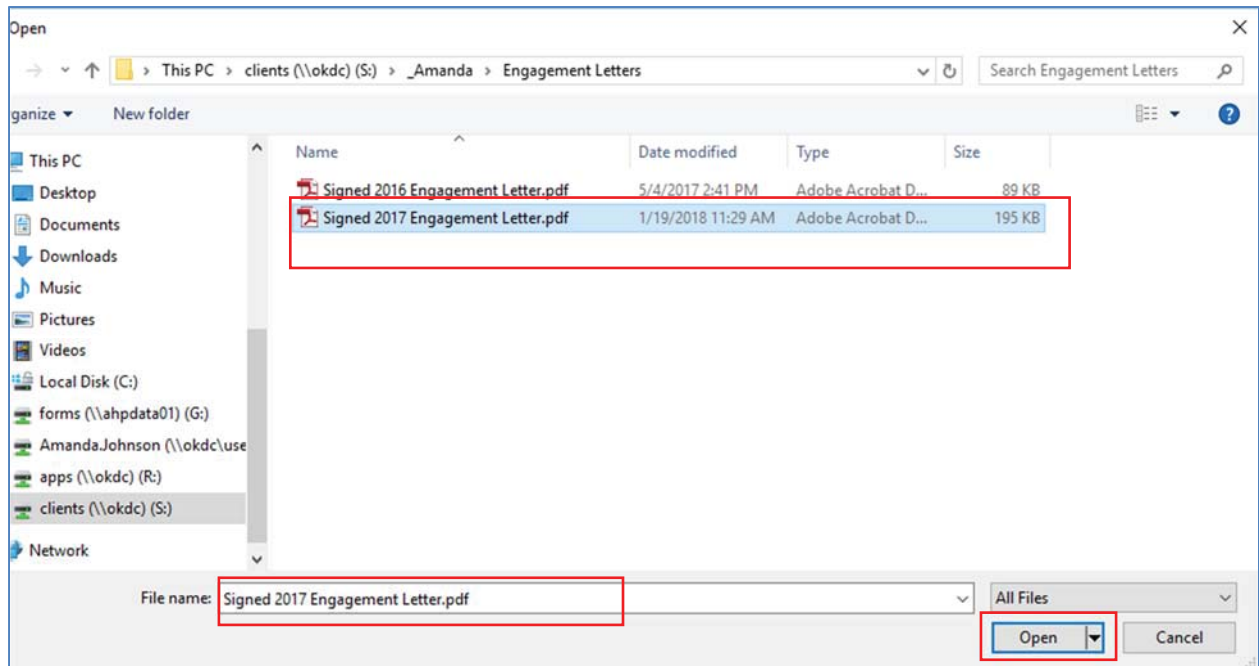


8. In the Upload file window, select Add Files to search for the document you want to upload to ClientFlow.



Note: If you do not want to upload a document, click on the X in the upper right corner to close the upload option.

9. Find the document you want to upload, select it and click on the Open button.



10. Click the Start upload button to upload the file to the portal and make it viewable to your firm.



Note: After the document has been uploaded, the document will become available in your list of documents in the portal. This feature shows the documents you uploaded to AHP through the portal.

11. After viewing or uploading documents, click on your name and log out to end your session with using the portal.

Important Information about Documents Uploaded through AHP's NetClient CS Portal

- Any type of document or file can be uploaded to the portal and viewed in its native format except for TIFF files.
 - TIFF files will be converted to PDF files when viewed by AHP.
- Approximately 400 MB is the maximum file size that can be uploaded to NetClient CS at one time.
 - A NetClient CS 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 folder.
- AHP may NOT be automatically notified when a user uploads a document to the portal. Please alert your main contact to let them know when documents have been uploaded.
- AHP determines which documents you can view by publishing them to NetClient CS. At any time AHP can unpublish a document where you will not be able to view it.