



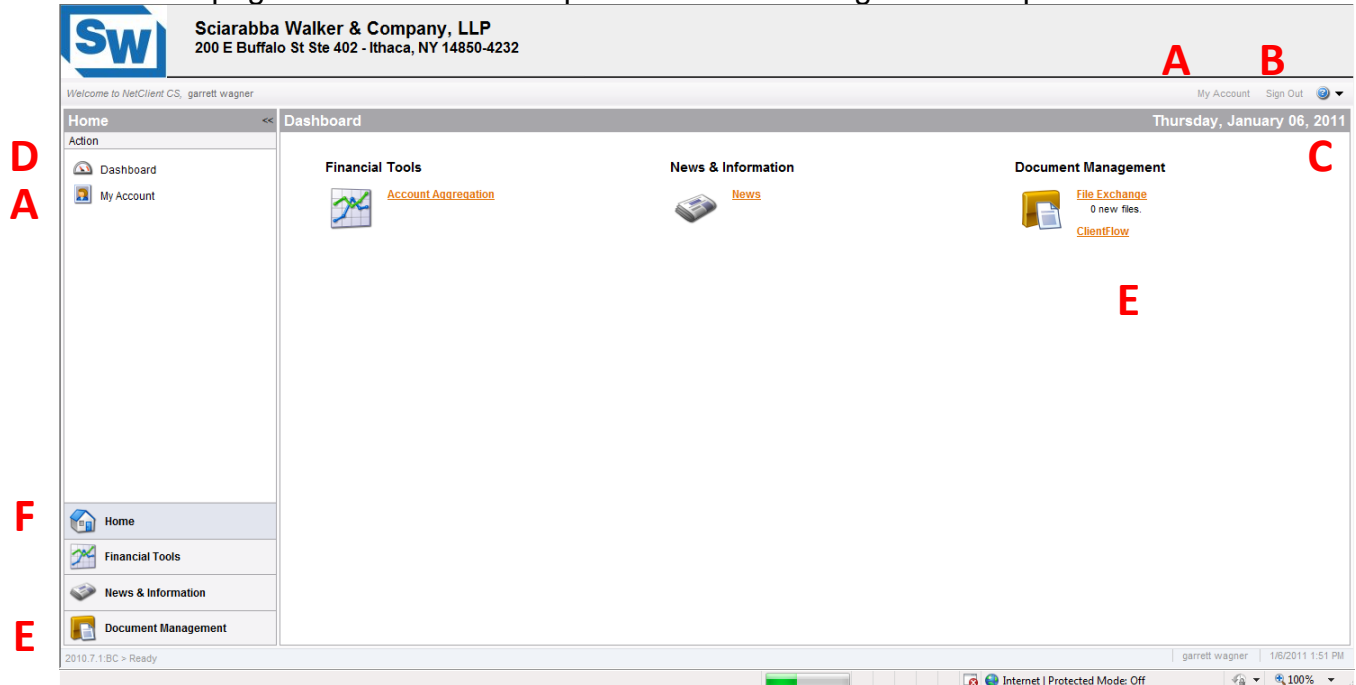
CERTIFIED PUBLIC ACCOUNTANTS  
BUSINESS CONSULTANTS

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# Client Portal User Guide

# Using the Sciarabba Walker Client Portal

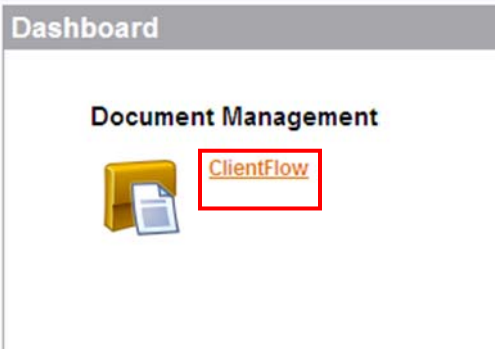
The home page of the Client Portal provides the following features/options:



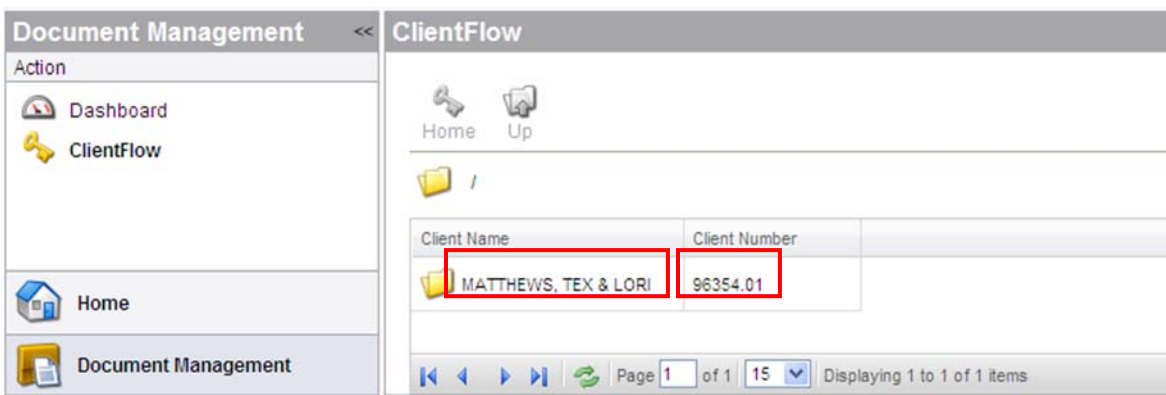
- A. **My Account** – Allows a user to view and update their Login, Name, Email Address and Password.
- B. **Sign Out** – Allows a user to sign out and end their session.
- C. **Help Menu** – Provides a menu of help topics.
- D. **Dashboard** – Allows a user to view all applications.
- E. **Document Management** – Allows a user to view all Document Management applications.
- F. **Home** – Allows a user to return to the Home view of the Dashboard to view all applications.

## Accessing Documents

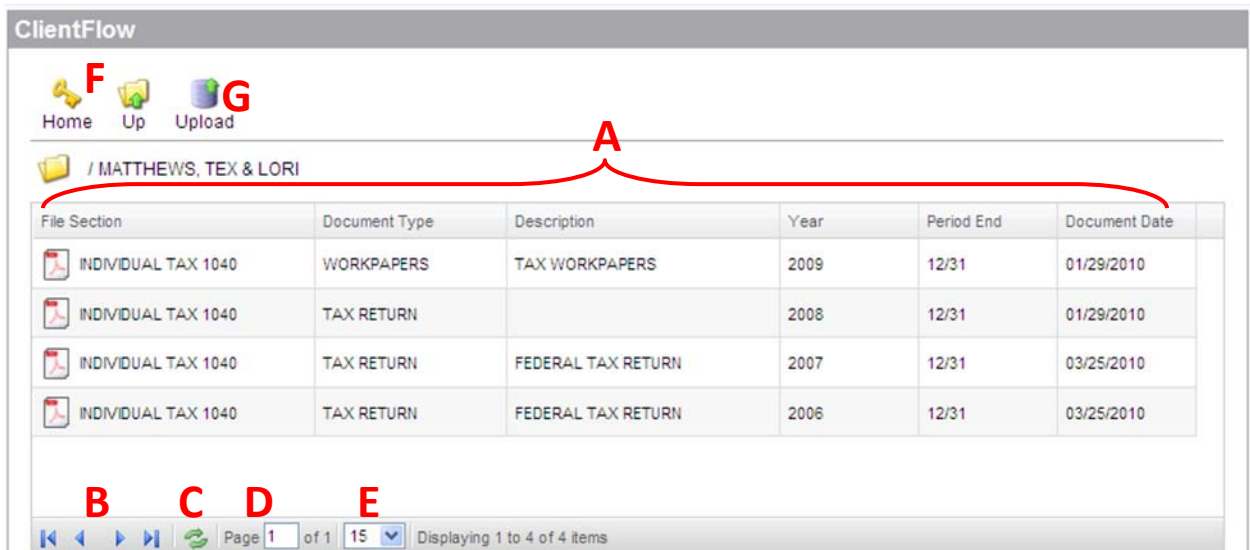
To access document(s) available for your review, click on the ClientFlow link (shown below). Depending on the number of accounts with the firm and permissions set by the Portal Administrator, one or more client accounts may appear.



1. Click on a Client Name or Client Number to see any documents for that client.



**Navigation Features of ClientFlow document list view in Client Portal**



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

- B. **Document List Page Navigation Buttons** – Allows a user to navigate between multiple pages of documents by going to the First Page, Previous Page, Next Page or Last Page.
- C. **Refresh Document List Button** – Allows a user to refresh the list of documents viewable on the page.
- D. **Document List Page Display** – Allows a user to navigate to a specific page number.
- E. **Document Display Drop-Down** – Allows a user to select how many documents they can view on a page.
- F. **Home/Up** – Allows a user to return to the list of Client Names and Client Numbers for which you can see published documents.
- G. **Upload** – Allows a user to upload a document to Client Portal.

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

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

The screenshot shows a document list in a web application. The list has columns for File Section, Document Type, Description, Year, Period End, and Document Date. The third row is highlighted with a red border:

File Section	Document Type	Description	Year	Period End	Document Date
INDIVIDUAL TAX 1040	WORKPAPERS	TAX WORKPAPERS	2009	12/31	01/29/2010
INDIVIDUAL TAX 1040	TAX RETURN	FEDERAL TAX RETURN	2007	12/31	03/25/2010
INDIVIDUAL TAX 1040	TAX RETURN	FEDERAL TAX RETURN	2006	12/31	03/25/2010


Below the list is a navigation bar with "Page 1 of 15" and "Displaying 1 to 4 of 4 items". A red arrow points from the highlighted row to a preview window below.

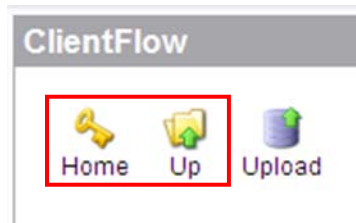
The preview window shows the top portion of a 2007 U.S. Individual Income Tax Return (Form 1040) for the taxpayer **Tex W. Matthews** and spouse **Lori M. Matthews**. The return is for the year 2007, ending 12/31/2007. The address is 4230 Woodhaven Drive, Canton, MI 48187. The social security numbers are 111-11-1234 for the taxpayer and 222-22-4567 for the spouse. The filing status is checked as "Married filing jointly".

**Note:** Documents opened from Client Portal are **READ-ONLY** and therefore cannot be edited and saved back to Client Portal. **If the document requires editing, save a copy to the local drive**

**(File / Save As), edit it as necessary, and then upload it back to Client Portal** (uploading is discussed in the next steps).

**Note:** To open and view a document that is in Client Portal, you need the applicable software. For example, to open and view a Microsoft Word file, you need to have Microsoft Word installed on your workstation.

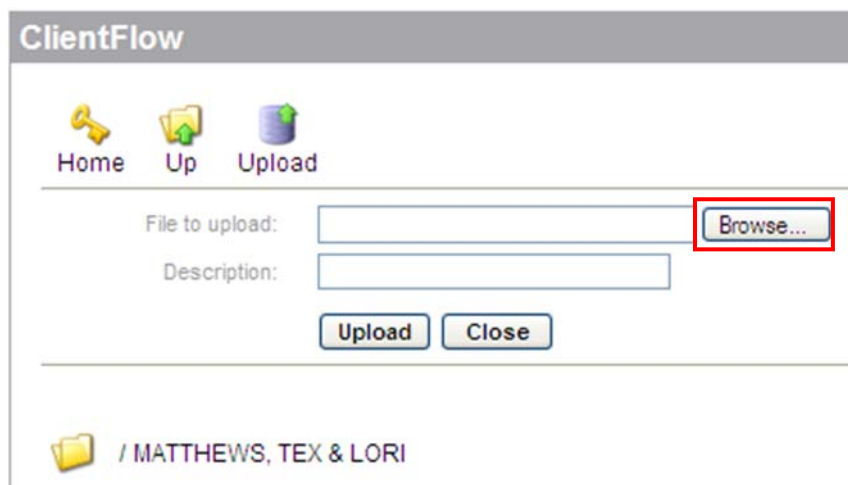
6. Click on the  in the upper right hand corner of the window to close the document after viewing it.
7. Click on HOME or UP icons, to return to the list of Client Names and Client Numbers for which you can see published documents.



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

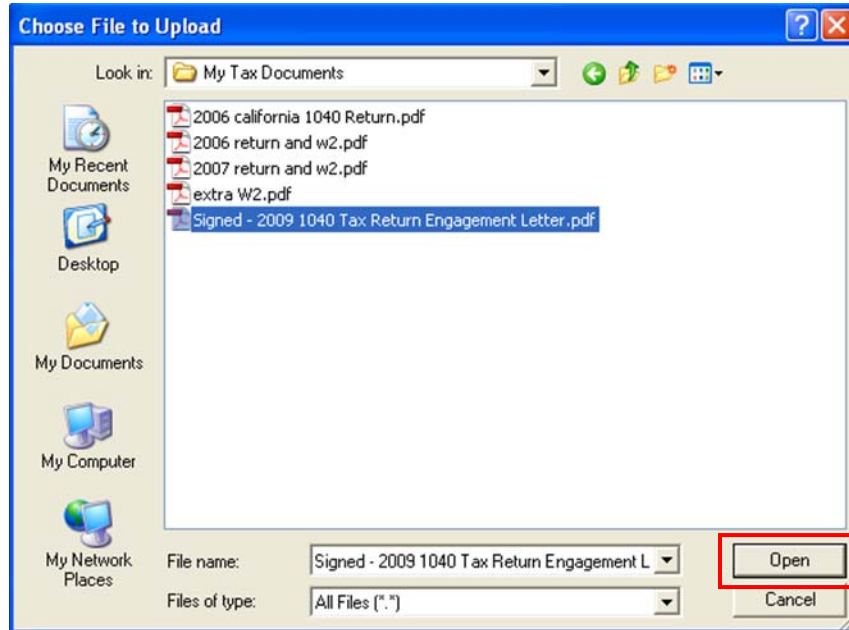


9. Click on the Browse button to search for the document you want to upload to Client Portal.

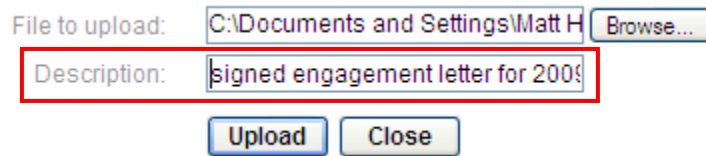


**Note:** If you do not want to upload a document, click the Close button to close the upload option.

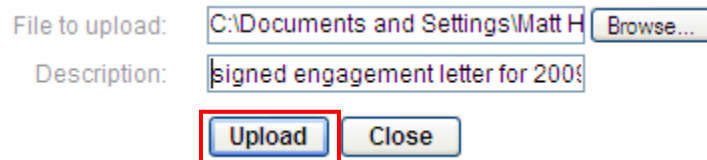
10. In the Choose file window, find the document you want to upload, select it and click on the Open button.



11. Enter a description about the document that you will be uploading.



12. Click on the Upload button to upload the file to Client Portal and make it viewable to Sciarabba Walker.



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

Please Note:

1. You will be notified by your tax advisor once a document is published to the client portal for your review via email. Documents of any type can be uploaded into the Client Portal.
2. 250MB is the maximum file size that can be uploaded at this time.

If you have questions please contact the Portal Administrator at [swportal@sciarabbawalker.com](mailto:swportal@sciarabbawalker.com).