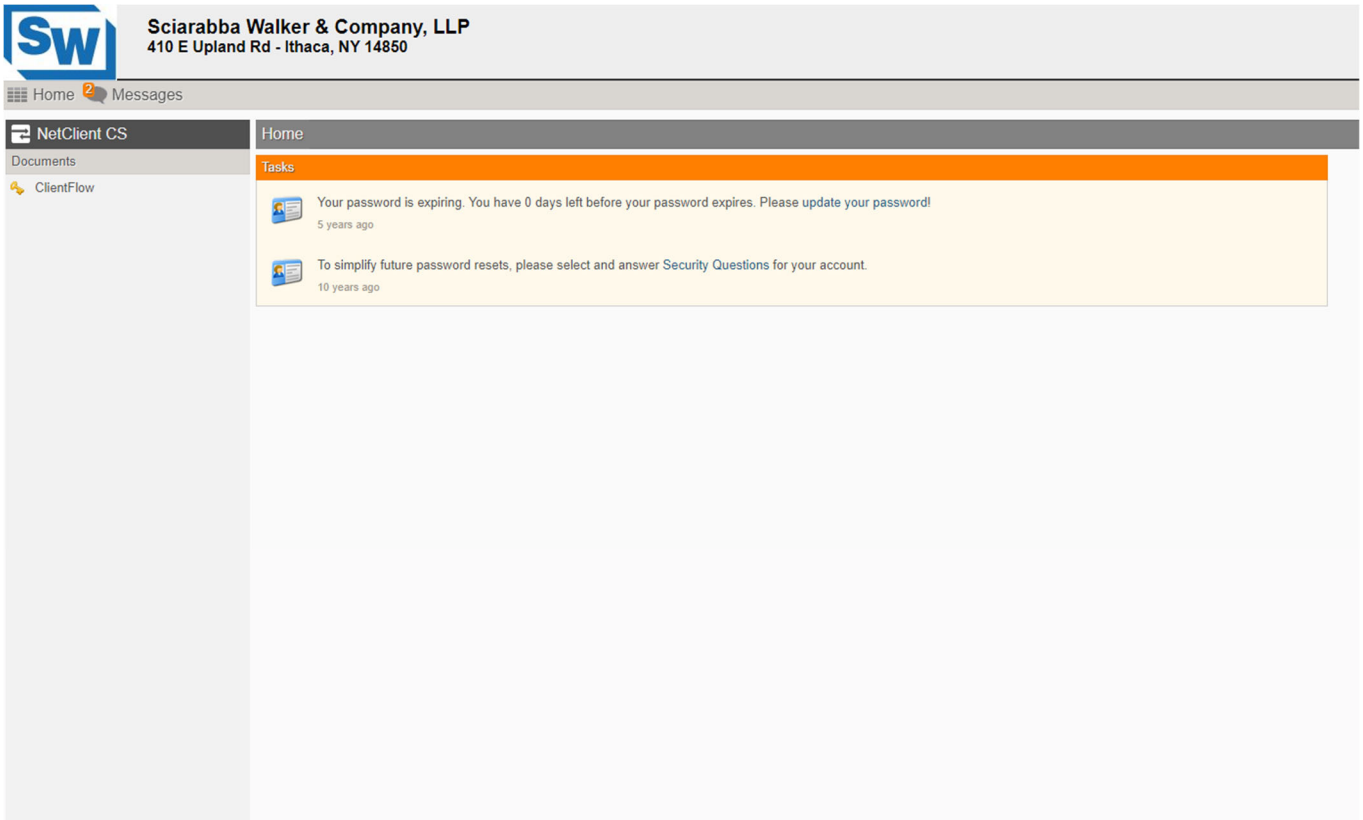
SCIARABBA WALKER &CO LLP

CERTIFIED PUBLIC ACCOUNTANTS
BUSINESS CONSULTANTS

Client Portal User Guide

Using the Sciarabba Walker Client Portal



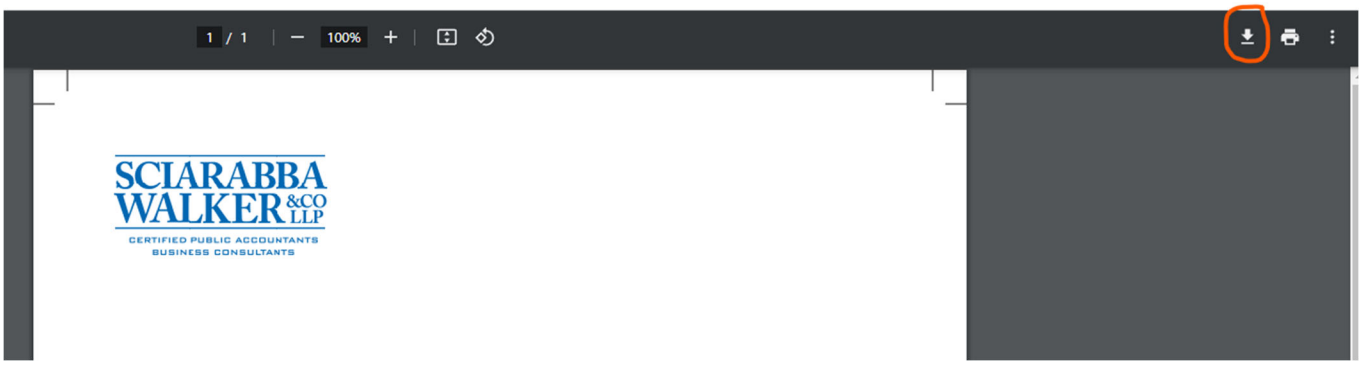
1. When logging into Portal you will see either this screen or you will see the ClientFlow screen if there isn't any Tasks. If you see this screen, then you will want to click on ClientFlow in the right hand side to open your folder access**.**
2. This view will show you all folders you have access to, if you single click on them it will open up any document that has been shared with you.

3. Once you have it open you will see the options for Home (brings you back to ClientFlow), Up (does the same thing as Home) and Upload (Lets you upload documents to your portal)
4. Once you click on Upload you will be given the option to browse to the document or drag and drop, Once you have everything you want to upload then click on Start upload. Once it is finished you will see all the documents you uploaded into GFR show up in the portal. If you don't see them, please let us know at Info@swcllp.com

Accessing Documents

To access document(s) available for your review, click on ClientFlow. Depending on the number of accounts with the firm and permissions set by the Portal Administrator, one or more client accounts may be available. Single click on the account you want to look at.

Once you have it open you can single click on the document you want to open and review it. If you print a copy of your document you will need to save it to your desktop first. To do that please Single click on the document you want to download. Then on the left hand side you will see the option to download the document and save it locally. If you don't then you will need to make sure you have Adobe reader installed. If you are MAC user and using Safari the option for this is at the bottom of your screen. If you don't see it then please download Chrome or Firefox and use that.



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 info@swcllp.com.