Client Portal Instructions

Introduction

We are pleased to offer our clients a means to access their electronic documents online through our Client Portal. The Client Portal is directly accessible from the Grimbleby Coleman website (www.gccpas.net) by hovering over the **Client Corner** link at the top right corner of our homepage, then selecting **Portal/Payroll Login** from the dropdown menu.

A login page will open and ask for your username and password.

If this is your first time logging in, please refer to the email you received with your login and password information (consider checking your spam folder). If you have any issues getting logged in, please contact our portal support staff at contactus@gccpas.net.

Client Portal System Requirements

Below are the internet browsers that are supported to fully utilize the Client Portal:

> Apple Safari – *version 5.0 or higher*
> Google Chrome
> Microsoft Internet Explorer – *version 7.0 or higher*
> Mozilla Firefox – *version 3.0 or higher*

In order to view/edit/save copies of documents, we recommend that users have the following programs installed:

> Adobe Acrobat or Reader 6.0 or higher

Microsoft Office 2003 or higher

Please be aware that if you have pop-up blockers turned on or enhanced security settings, your usage of our portal may be restricted. Please verify your settings in your internet browser if you encounter any issues.

For use of the portal on your mobile device we recommend you download the app for iOS or Android.
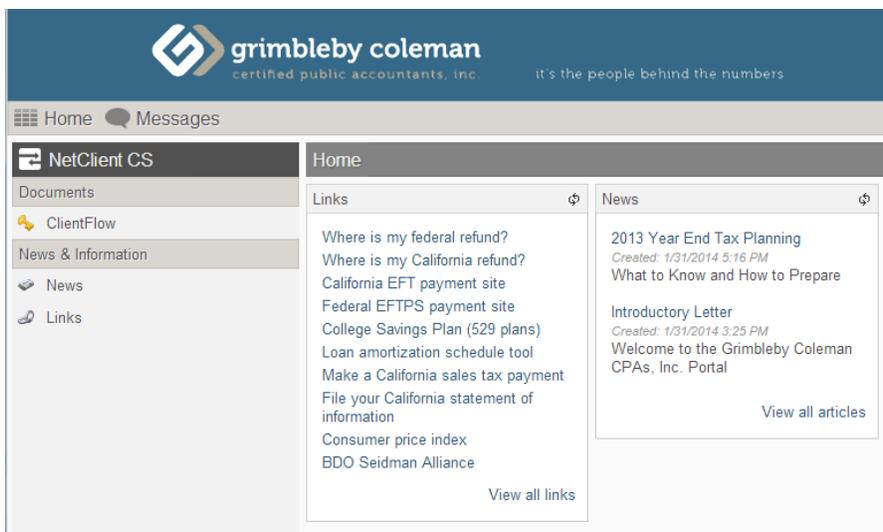For iPhone and iPad:
http://itunes.apple.com/us/app/netclient-cs/id572952397?mt=8&uo=4
For Android:
http://play.google.com/store/apps/details?id=com.thomsonreuters.clientess

Using the Client Portal
Once you have logged into our Client Portal, you should see a homepage similar to below:

Viewing/Saving documents in the Client Portal
To view documents in the portal, you can click on the ClientFlow link on the dashboard.

You may have access to multiple accounts with our firm. If so, you must select the folder that you wish to access.

Once you have selected a folder, the screen will then refresh and show the documents available for your access. Please keep in mind that documents will not appear here unless we have granted access to them from our files. **If you do not see a file here that you wish to have access to, please contact our support staff at contactus@gccpas.net.**
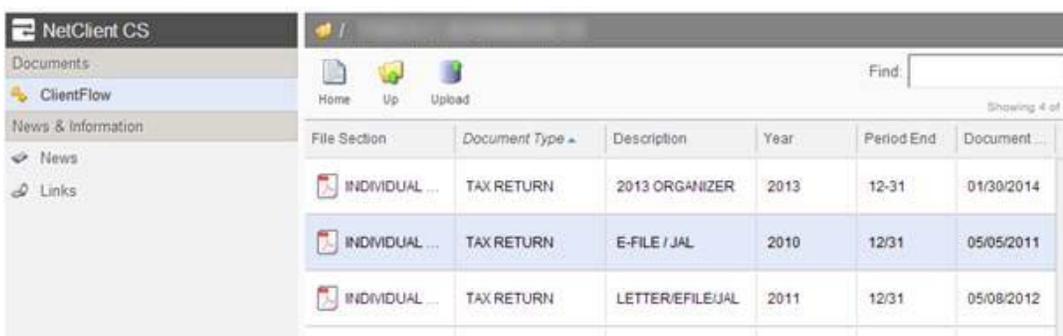
To view a document, you can simply click on it. The document will then open in a separate viewer window. If you wish to make any changes to the file, you will need to save a copy to your computer and then re-upload it to us.

We can transmit nearly any type of document to you. Depending on the setup of your computer, most users will be able to save a copy of any document from the portal. Below are some tips in saving copies of documents from most file formats:

Adobe Acrobat (PDF files) – The file will likely open directly into Adobe Reader or Adobe Acrobat depending on which program you have installed on your computer. Most users will see this icon in the Adobe Acrobat toolbar when they opened the document. You can click the 'disk' or Save icon to save a copy of the document to wherever you choose. Depending on the web browser that you use, you may also be able to right-click the opened file or use the browser to save a copy of a PDF file.


Microsoft Excel / Word – You will likely see a prompt similar to the one below; you can open or save the file before accessing.

Even if you choose to 'Open' the file, the document still needs to open in Microsoft Word or Microsoft Excel to view the file. The file will open in the native program; you will be able to choose File > Save As to save a copy. Depending on the settings you have selected for your Internet browser, you may have different options for saving or viewing files.

QuickBooks files – Our portal does support the transmission of QuickBooks files. Most users will see a prompt similar to the one below.
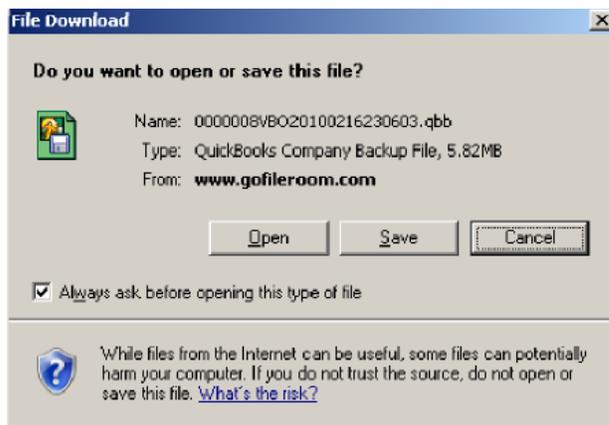

Uploading documents in the Client Portal

Our Client Portal supports the ability to upload files securely to the portal for easy retrieval by GC employees. This is useful for documents that are too big to be sent securely by email or to simply upload documents to store on the portal for easy access.

To upload a file, click on the upload icon.

Click the Select Files icon to locate the file on your computer using Windows Explorer. Once you have located the file, you will then click the Upload icon to return back to the ClientFlow screen.
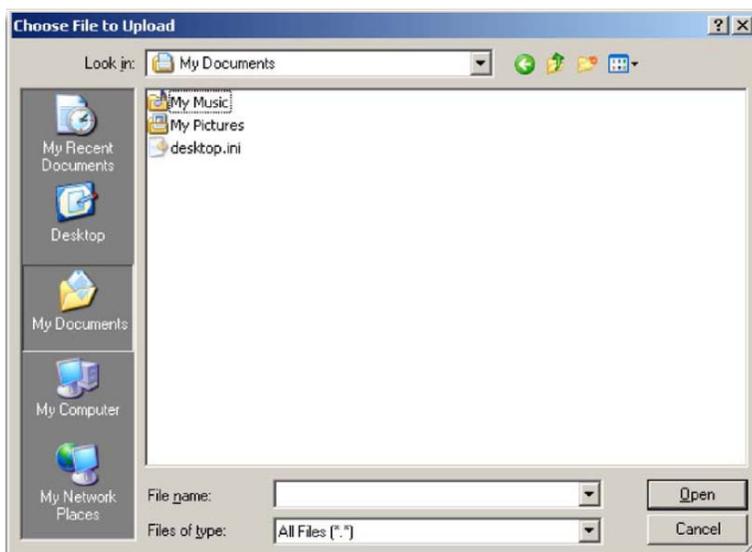
You should now see this file in your folder with your other documents. As this file is now stored in our file drawer, you will need to contact a GC representative to remove this file at any point.

Using My Account

At the top of the screen, in the right corner, you may click the icon with your name to update information about your account. You can create a custom login name, update your password and set security question responses, as needed.
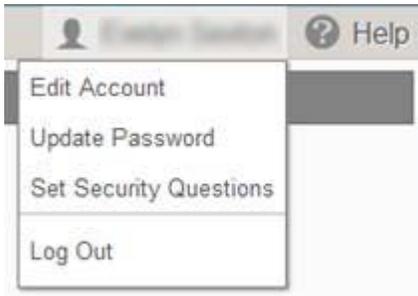
Here are some things to remember regarding choosing a secure password:

- The password must be at least 7 characters.
    - One character must be an uppercase letter.
    - One character must be a number.
- Your login may not be contained within your password.
- Your account first or last name may not be contained within your password.