NetClient CS

Portal User Guide

Unlike emails and their attachments, the Client Portal uses encryption technology so you and your firm will have confidence knowing that the information is secure when transferred back and forth.

System Requirements for using the NetClient Portal

To access and use the Client portal, you need high-speed internet access.   Also, NetClient and ClientFlow Document Management Module require:

- Internet Explorer (version 7.0 or higher) web browser,
- MSMXL 4.0 SP2 Microsoft system files (**msxml4.dll**)*
- A Microsoft windows-based PC operating Windows XP or newer.

* If you do not have this file, please click on this link to download:

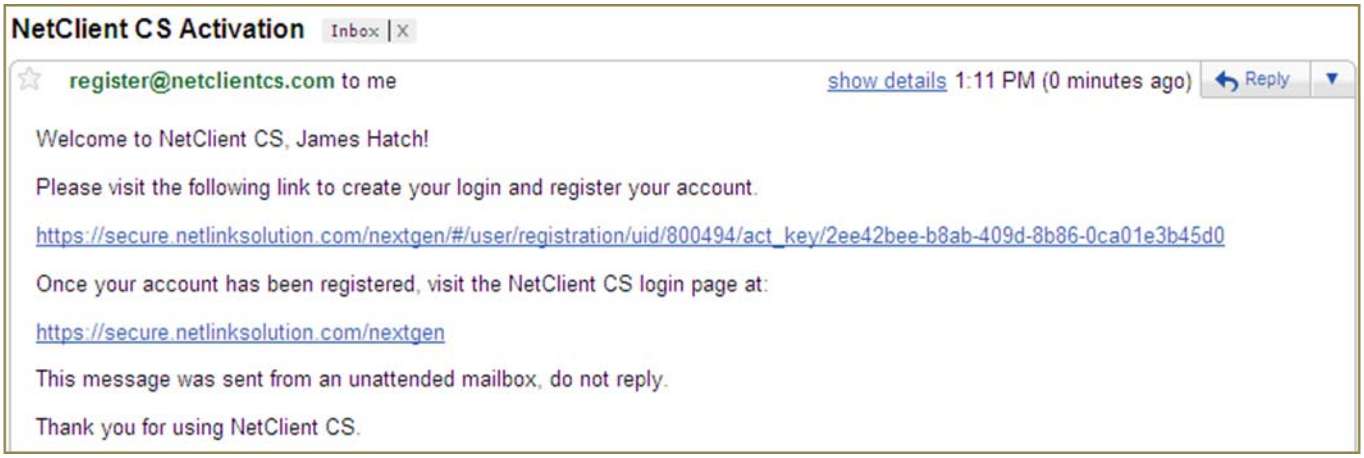
http://www.gofileroom.com/downloads/msxml4sp2.exe

Note: **Documents opened from the client 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 it as necessary, and then upload it back to the portal (uploading is discussed in the next steps).**

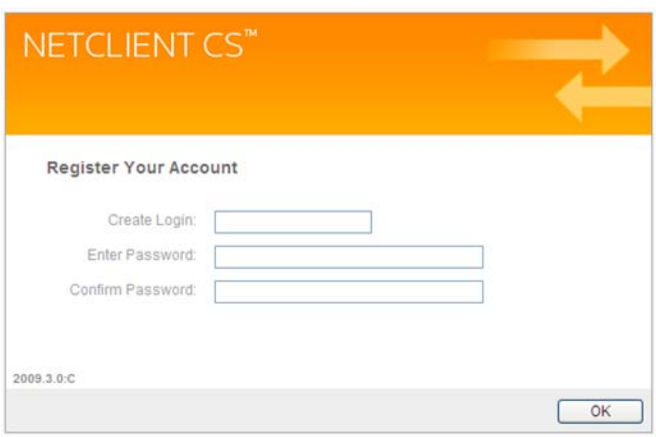
Accessing and Using the Client Portal

To access the portal, ACI will create an account for you. You will then receive a registration email from register@netclientcs.com. **It is very important that you actively look for this email, as your email program may treat this email as a spam or junk email.** In the email, it will contain a link (or URL address to copy and paste into the browser) that will take you to a page to create a login and register your account. If you cannot locate the registration email then contact ACI and they can resend the registration email.

Sample Login Email:



1. Once the email has been received go to the registration website and follow these steps:
    a. Enter a login in the Create Login field (Note: Use your email address as your login to make it easier to remember)
    b. Enter a password in the Enter Password field (see password requirements below)
    c. Re-enter the password in the Confirm Password field



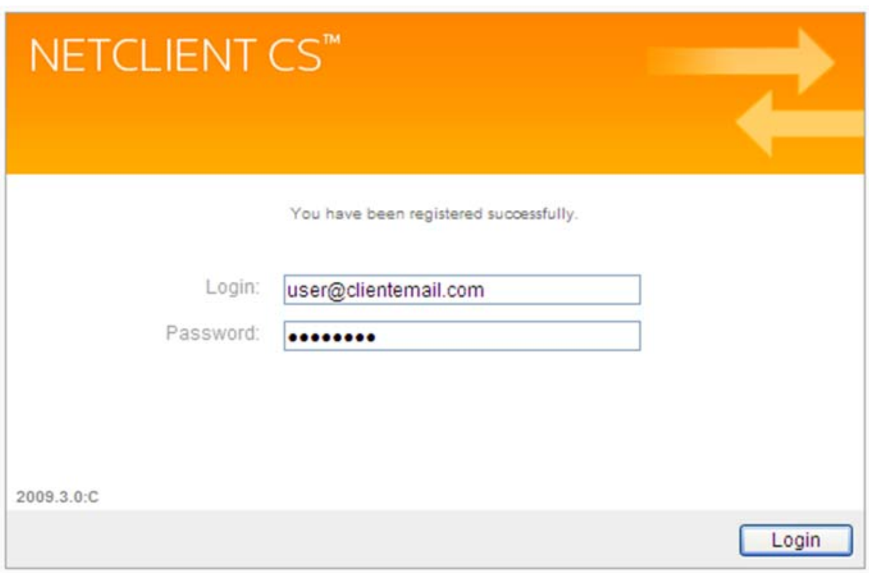
Important Information about your Login and Password

- The password must be at least seven (7) characters long and must include letters and numbers (e.g. **password1**). You can also use symbols (e.g., %, $, #)
- Passwords are case sensitive (e.g. PassWord1)
- Users will be required to change their Passwords every 180 days 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.
- If ten consecutive, unsuccessful attempts are made to log in to an account, the login for that account is locked. An email message will be sent automatically to the email address assigned to the login; the email message notifies 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 portal user account, contact ACI.**

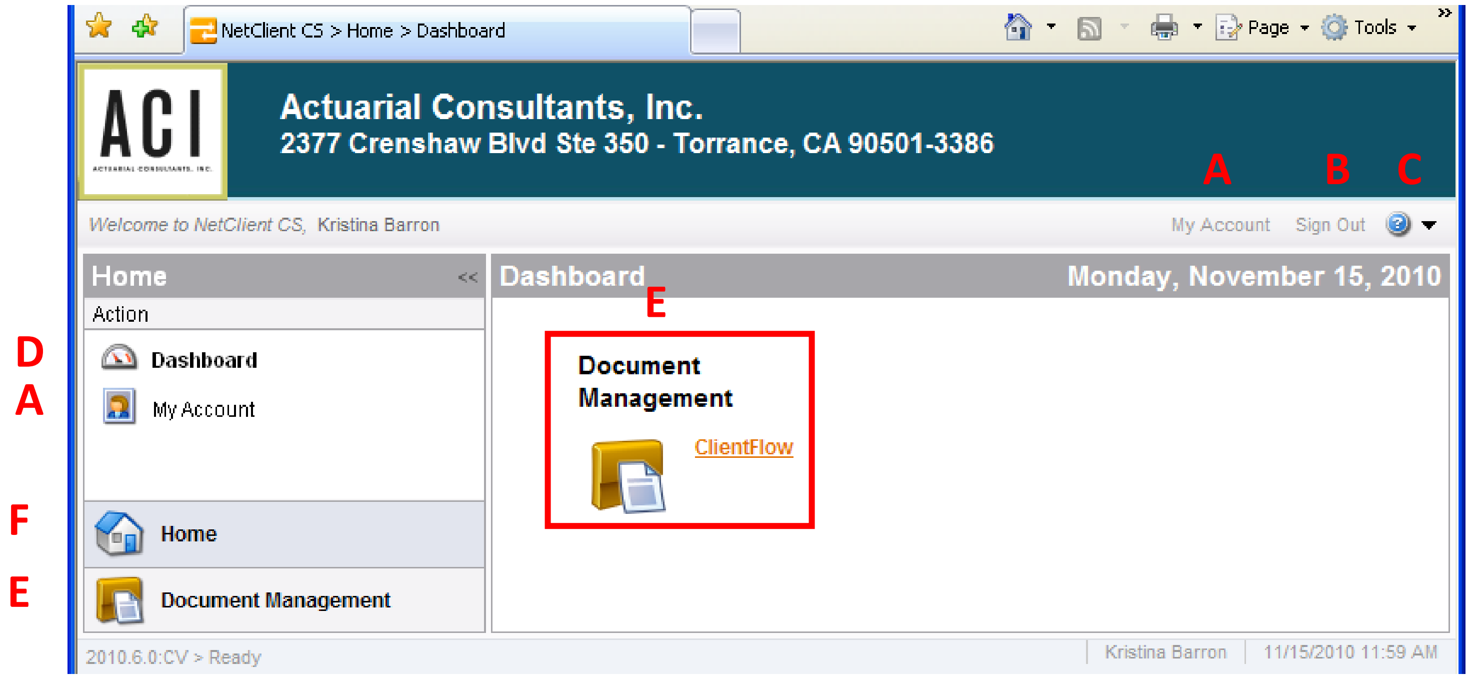
  Note: **For future access and to login to the portal after this initial login, visit www.acibenefits.com for a login button, or save the login site for the client portal as a Favorite in your browser.**

2. After successfully registering your Client Portal account, confirm that your login is in the Login field and enter your password that you just created and click on the Login button.



Note: After logging in, the Portal Home or Dashboard page will be displayed listing ClientFlow in the Document Management module. Also, Security Questions can be setup to simplify password resets if you should forget your password.

Navigation Features of Client Portal



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 of using the Portal.

C. **Help Menu –** Provides a menu of help topics for using the Portal and ClientFlow.

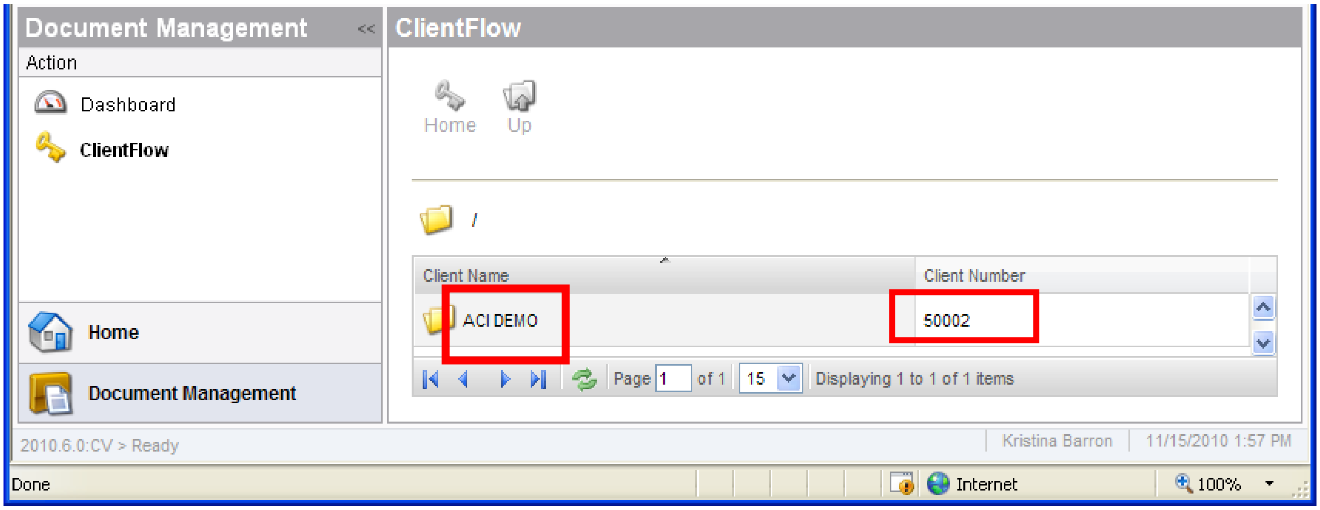
D. **Dashboard –** Allows a user to view all applications they have access to on the Portal.

E. **Document Management –** Allows a user to view all Document Management applications they have access to on the Portal.

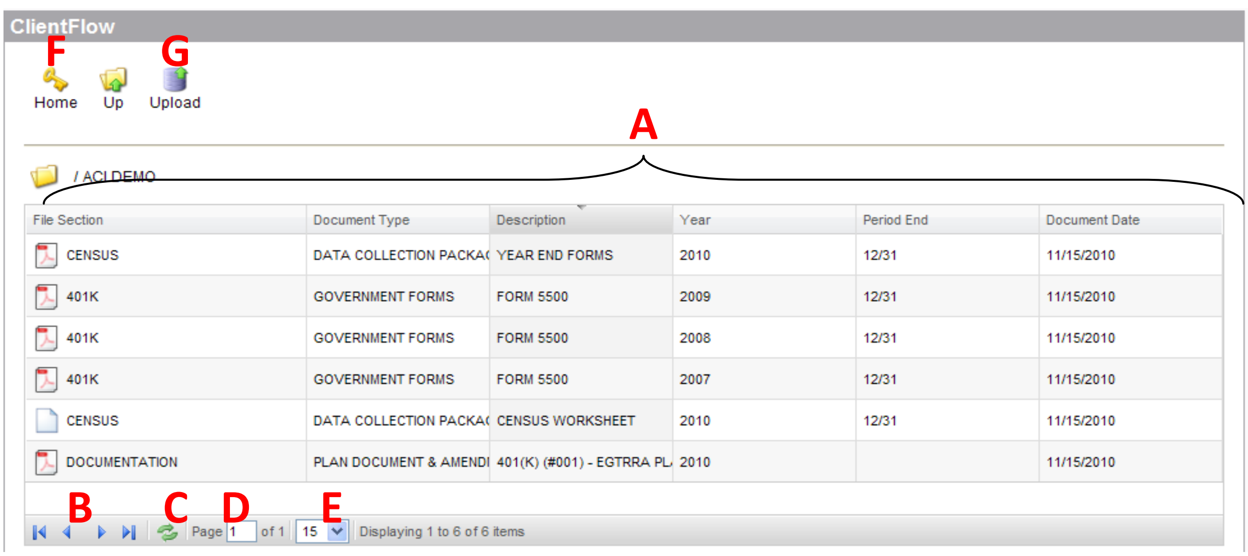
F. **Home –** Allows a user to return back to the Home view of the Dashboard to view all applications.

3. Click on ClientFlow to open the application.

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



Navigation Features of ClientFlow document list view in the NetClient CS 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 by 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.

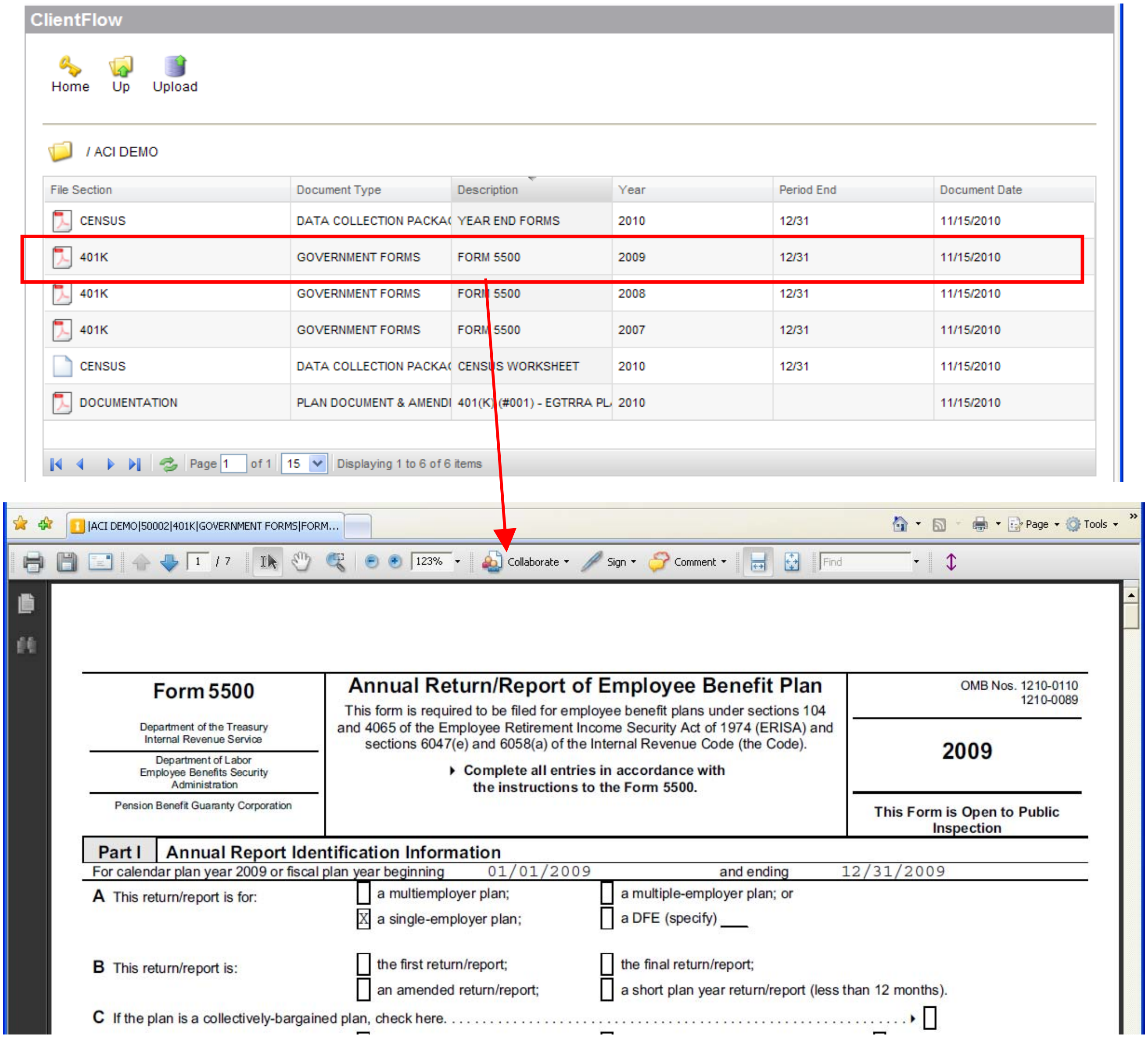
E. **Document Display Drop-Down –** Allows a user to select how many documents they can view on a page.

F. **Home/Up –** Allows a user to return back to the list of Client Names and Client Numbers for which you can see published documents for.

G. **Upload –** Allows a user to upload a document to ClientFlow.

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

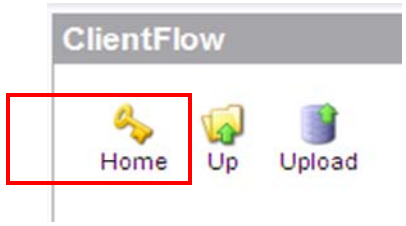
5. Click on any document in the list to open the document up in view mode (i.e., read-only mode).



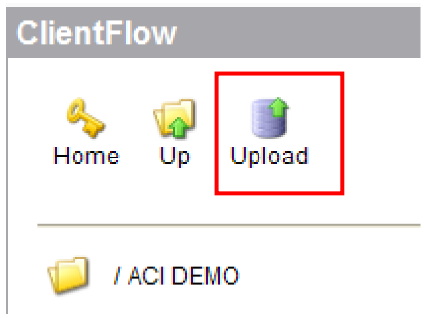
***Note:* Documents opened from the client portal are READ-ONLY and therefore cannot be edited and saved back to the portal. If the document requires editing, save a copy to the local drive (File / Save As), edit it as necessary, and then upload it back to the portal (uploading is discussed in the next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

6. Click on the  in the upper right hand corner of the window to close the document after viewing it.

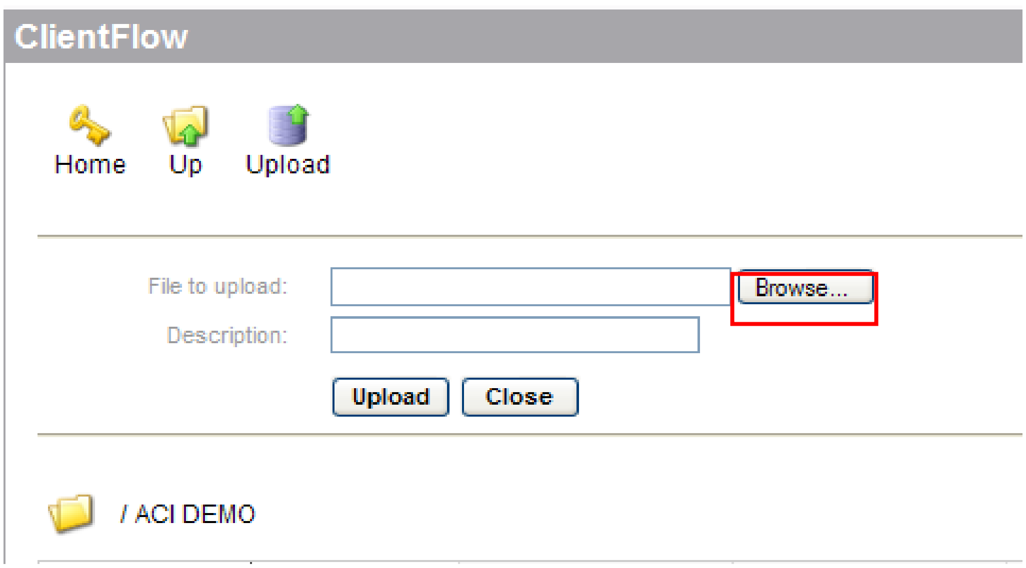
7. Click on HOME or UP icons, to return back to the list of Client Names and Client Numbers for which you can see published documents for.



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

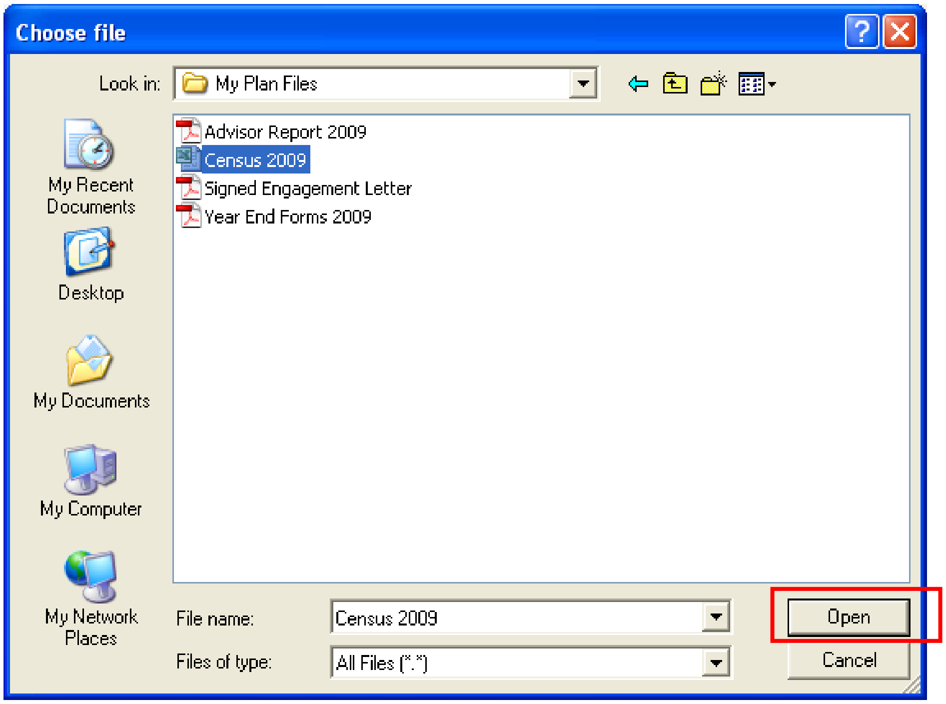


9. Click on the Browse button to search for the document you want to upload to ClientFlow.

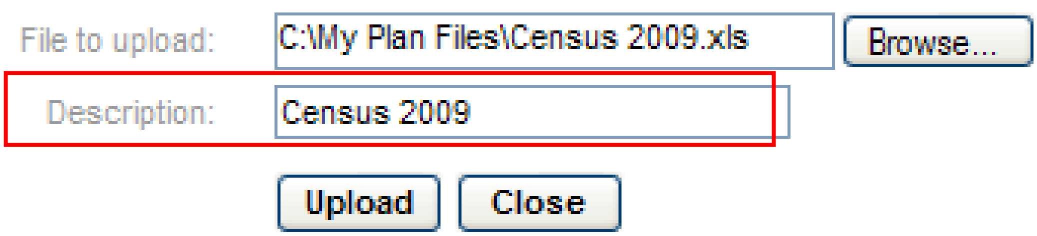


Note: If you do not want to upload a document, click the Close button to close the upload option.

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

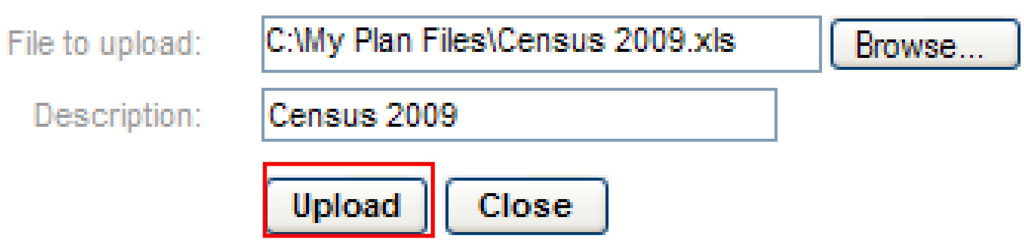


11. Enter a description about the document that you will be uploading.



Note: You can add up to 225 characters of text to describe your document.

12. Click on the Upload button to upload the file to NetClient CS and make it viewable to your firm.



Note: **A**fter the document has been uploaded, the document will become viewable in your list of documents. This feature provides you a record of the documents you uploaded to your firm through the portal.

13. After viewing or uploading documents, click on Sign Out to end your session with using the client portal.

Important Information about Documents Uploaded through ClientFlow in the Portal

- Any type of document or file can be uploaded with the portal and viewed in its native format except for TIFF files.
    - TIFF files will be converted to PDF files after upload.
- Approximately 250 MB is the maximum file size that can be uploaded through the ClientFlow module in NetClient at one time.
    - A Portal 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 ZIPPED (compressed) folder.
- ACI determines which documents you can view by publishing them to the Portal. At any time ACI can unpublish a document where you will not be able to view it.