GOFILEROOM

NetClient CS Document Management Portal User Guide

version 10.x

TL 25027 (5/7/12)

Contents

Introduction

Think of your NetClient CS® portal as an extension of our website, through which we can securely and quickly exchange electronic documents with you and deliver electronic documents to you.

Sharing documents electronically is good for the environment because it doesn't require the use of resources that are needed to produce and transport printed documents. Also, unlike email messages and their attachments, NetClient CS portals use encryption technology to ensure that your information is secure.

Depending on your document-management needs, we gave you access to the ClientFlow™ module, the File Exchange module, or both. ClientFlow interacts directly with our document-management system, which allows us to quickly and conveniently exchange files and information with you. File Exchange also provides a fast and convenient way to exchange documents, and it has additional features, such as a Private folder, in which you can store your most important documents.

System requirements for NetClient CS

You must have a high-speed internet connection to use NetClient CS. NetClient CS is compatible with the following internet browsers.

- Google Chrome™
- Microsoft® Internet Explorer® version 7.0 or higher
- Mozilla® Firefox® version 3.0 or higher
- Apple® Safari® version 5.0 or higher

For more information about system requirements, please contact us.

Getting Started with NetClient CS

In this chapter, you will learn how to register your NetClient CS account, how to log in to NetClient CS, and how to access key features of NetClient CS.

Note: The images in this guide are examples. Depending on the features we enabled for you, your NetClient CS portal may look different.

Activating your NetClient CS account

After we create your NetClient CS account, you will receive an activation email message from either register@netclientcs.com or from an email address that is specific to our firm. The message will contain a link through which you can create a login and password for your NetClient CS portal.

Important! If you do not receive an activation email message, contact us.

Follow these steps to activate your NetClient CS account.

1. In the activation email message, click the registration link to create your login and register your account.
2. In the NetClient CS registration screen, enter a login in the **Choose Login** field.

   Tip: Use your email address as your login to make it easier to remember.

3. Enter a password in the **Choose Password** field.

   Notes

   - Passwords must contain at least seven characters, and they must include both letters and numbers (for example: password1).
   - Passwords can contain symbols, such as %, $, and #.
   - Passwords are case sensitive (for example: PassWord1).

4. Re-enter the password in the **Confirm Password** field.
5. Click Register.

Notes

- If you have questions or if you have difficulty accessing your NetClient CS account, contact us.
- After you register your account, you can log in to NetClient CS from our website. You can also bookmark the NetClient CS login screen in your browser.

Additional information

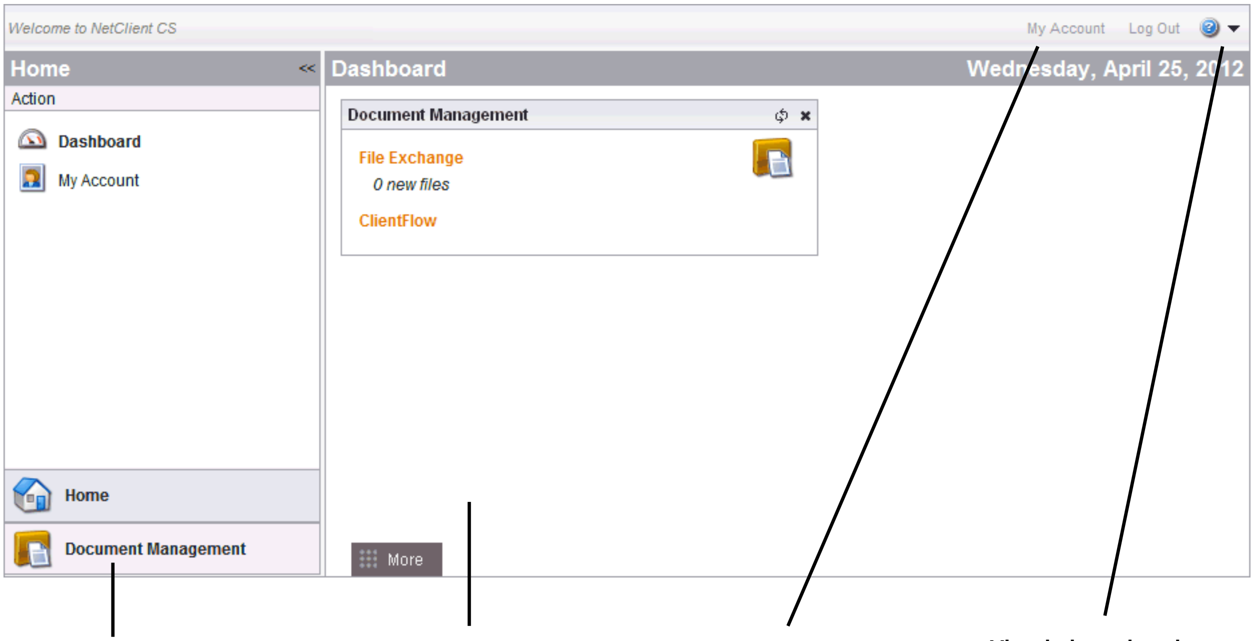
- You might be required to change your password at regular intervals for security purposes. You cannot reuse passwords.

  Note: To learn how often you will be required to reset your password, contact us.

- If you forget your password, you can reset it by answering a series of security questions that you can set up after you activate your account. To set up security questions, click the **My Account** link at the top of the NetClient CS screen.
- If you don't remember your password, click the **Can't access your account?** link in the login screen to have NetClient CS send you a temporary password via email or to reset your password by answering the security questions (if you set them up).
- If anyone makes ten consecutive attempts to log in to a NetClient CS portal using an incorrect password, NetClient CS will disable the login for the portal. NetClient CS will also send an email message to the email address that is assigned to the login; the email message notifies the user of the unsuccessful login attempts, and provides a link to enable the login. NetClient CS will enable the login after 30 minutes or when the user clicks the link in the email message.

Navigating in NetClient CS

NetClient CS provides quick access to all to of the features you need to manage your electronic documents.



Click this button to open the Document Management dashboard, through which you can access ClientFlow and File Exchange.

The Home Dashboard provides access to all NetClient CS modules.

Update your login, email address, and security questions through the My Account link.

View help topics about working in NetClient CS, including ClientFlow and File Exchange.

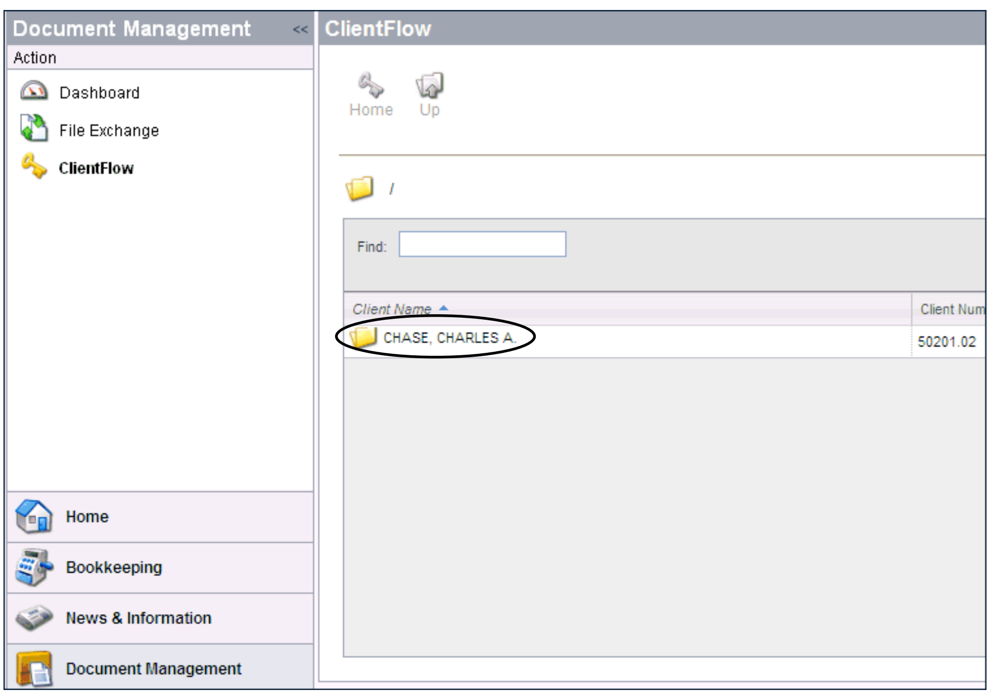
Managing Documents with ClientFlow

This chapter describes how to manage portal documents in NetClient CS using ClientFlow.

Viewing ClientFlow documents

After registering your NetClient CS account, you can view the documents that we placed in ClientFlow for you.

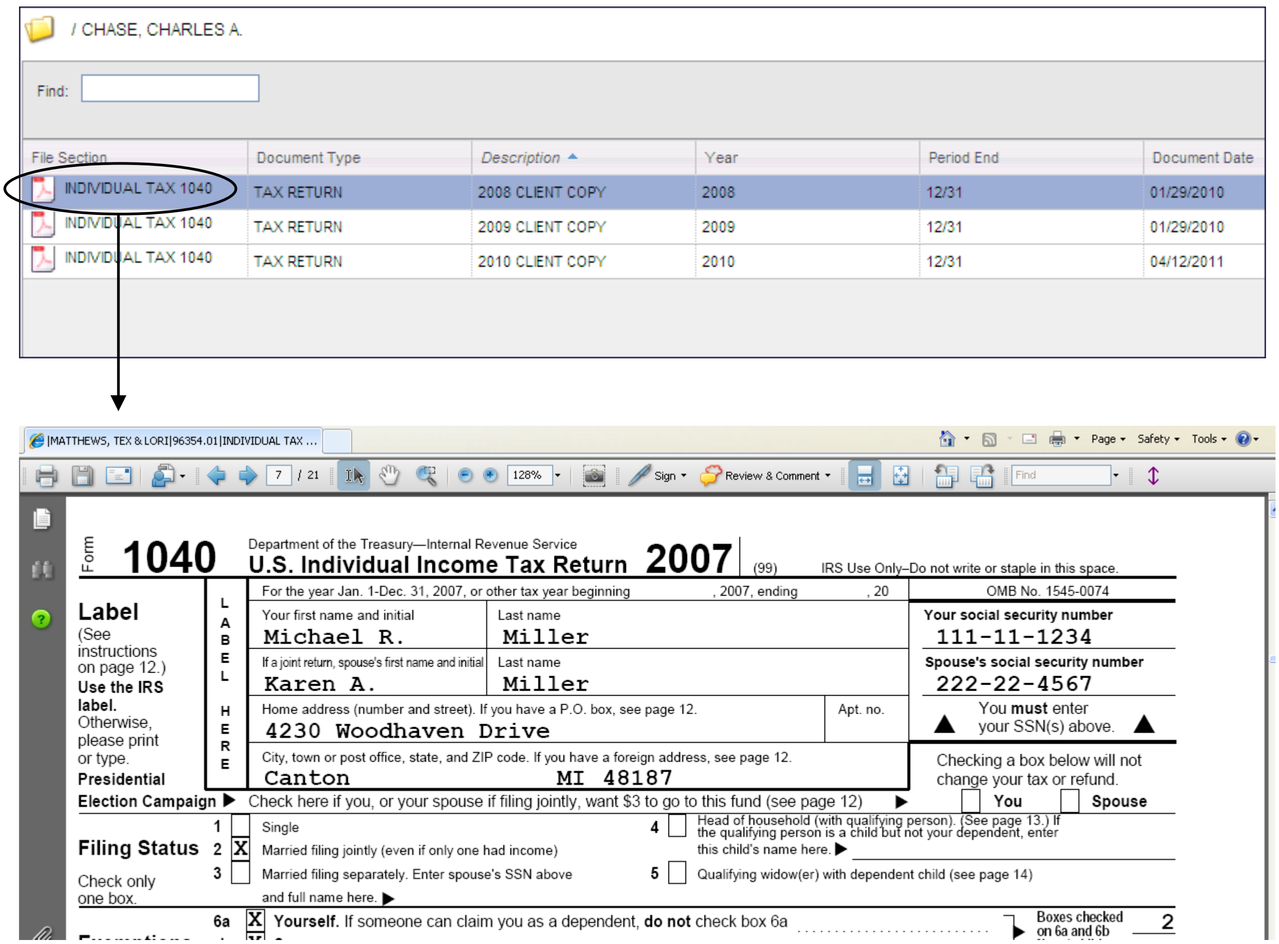
1. Log in to NetClient CS through the link on our website.
2. In the navigation pane, click the Document Management button and then click the ClientFlow action icon.
3. In the ClientFlow screen, click a folder to view its contents.



Notes

- Columns in the ClientFlow screen contain values that we assign to each document for easy organization and quick access. To resize a column, click and drag its border. Click a column heading to sort the documents in the list by the information in that column.
- The ClientFlow screen is empty if we have not published any documents to NetClient CS for you, and if you have not uploaded any documents recently.

4. Click a document to view it.



Notes

- Because documents in ClientFlow are read only, you cannot edit them. If you need to edit a document, save a copy of it to your local drive by choosing File > Save As (or by clicking the Save button in the Acrobat toolbar), edit the document, and then upload it to NetClient CS as described in “Uploading documents to ClientFlow” on page 9.
- You can view documents only if the software applications in which the documents were created are installed on your computer. For example, to view a DOC or a DOCX file, Microsoft Word must be installed on your computer.

5. Click the close button when you are done viewing the document.

6. Click the Up  icon to return to top-level ClientFlow folder.

Uploading documents to ClientFlow

Follow these steps to upload documents to ClientFlow.

1. Click the folder to which you will upload documents.
2. Click the **Upload**  icon and then click the **Select Files** button.

   Tip: Click the Upload icon again to cancel the upload.

3. Navigate to the documents you want to upload, select them, and click **Open**.
4. Click the **Upload** button below the selected files. We can now view the documents.

   Note: Depending on how we configured your NetClient CS portal, the uploaded documents might be available for you to view through ClientFlow.

5. Click the **Log Out** link to log out of NetClient CS.

Additional information

- You can upload files of any type to ClientFlow. Note that TIFF files are converted to PDF files during upload.
- You can upload files of up to 1 gigabyte (GB).
- Your NetClient CS session may time out if your internet connection is not fast enough to complete a single upload within three hours.
- You can upload multiple documents or files to ClientFlow simultaneously.
- Please notify us when you upload documents.
- We determine which documents you can view through ClientFlow, and we can remove documents from your portal at any time.

Managing Documents with File Exchange

We might also provide documents to you through the File Exchange module in NetClient CS. As with ClientFlow, you download File Exchange documents to your computer, complete or modify the documents as necessary, and then upload the documents to your portal, where we can access the updated documents.

File Exchange folder types

If you have access to File Exchange, we will provide one or more of the following types of folders.

Type of folder	Description
Permanent	Documents that are placed in permanent folders will remain in the folders until we delete them. Documents in permanent folders are visible to you and to us.
Temporary	Documents that are placed in temporary folders are available for 14 days after they are uploaded. After 14 days, NetClient CS deletes the contents of these folders automatically. Documents that are placed in temporary folders are visible to you and to us.
Private	Documents remain in the Private folder until you delete them.

Note: File Exchange folders may be empty if we have not yet published any documents to File Exchange for you, or if you have not recently uploaded any documents. Temporary folders are empty if documents have not been uploaded to them in the last 14 days.

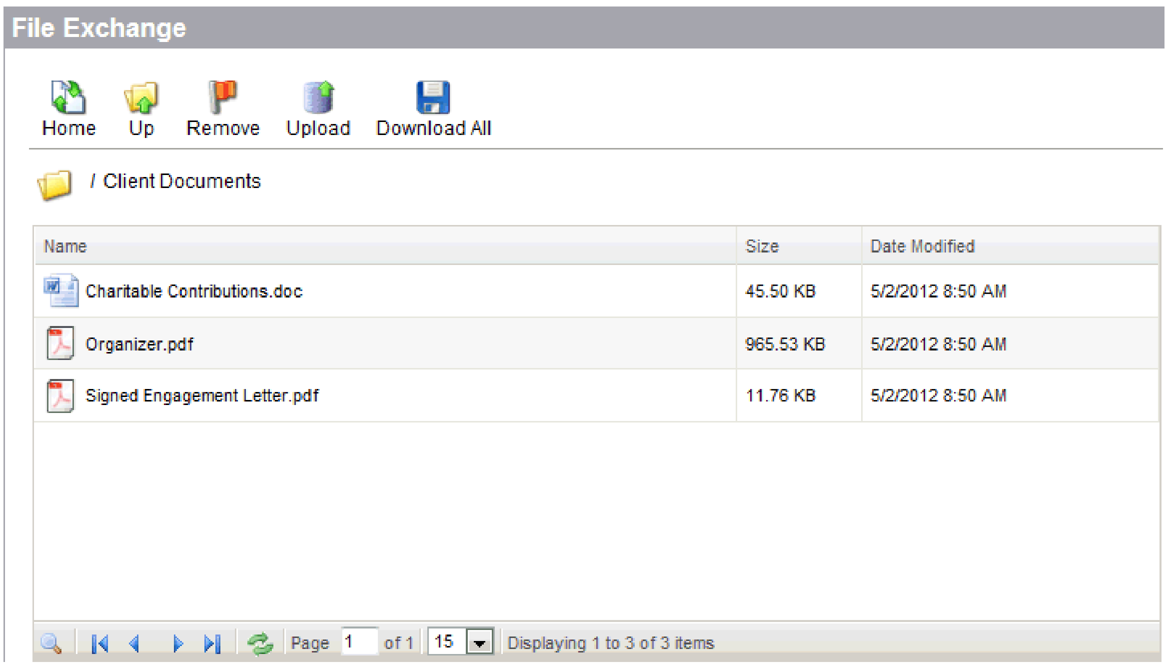
Viewing File Exchange documents

Follow these steps to view documents through File Exchange.

1. Log in to NetClient CS through the link on our website.
2. In the navigation pane, click the **Document Management** button and then click the File Exchange icon.

> ***Note:*** A statement appears under the File Exchange icon if new documents are available for you. If new documents are available, you can follow the red flags to locate the new documents.

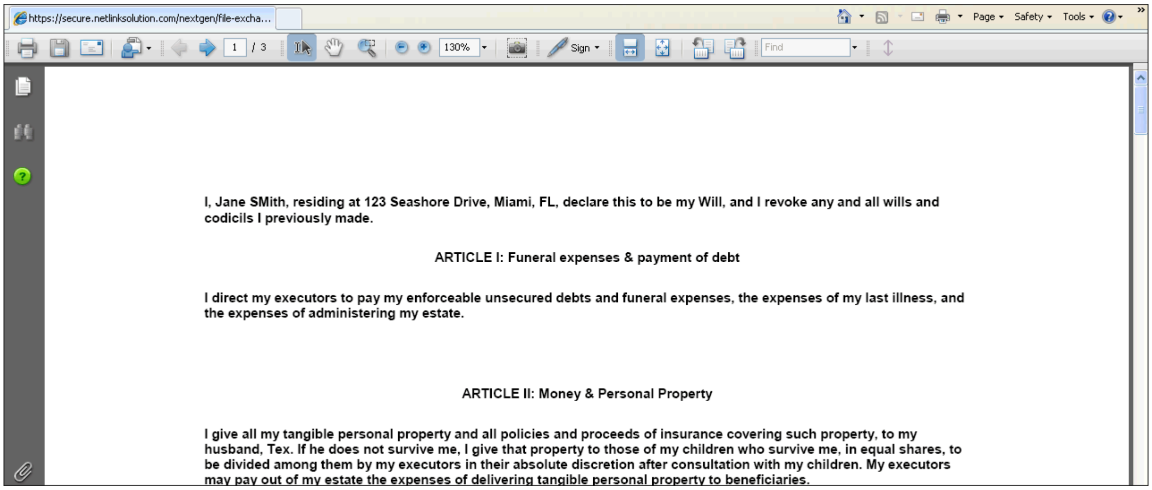
3. In the File Exchange screen, click a folder to view its contents.



Tips

- If the items in the list extend beyond the current view, use the toolbar controls at the bottom of the File Exchange screen to search for an item, navigate through subsequent pages, refresh the current view, or adjust the number of items to be displayed in the current view.
- Click the Home icon to return the top-level File Exchange folder.
- Click the Up icon to go up one folder level.
- Click the Remove icon to remove the red flags that appear to the right of newly uploaded documents.

4. Click a document to view it.



I, Jane SMith, residing at 123 Seashore Drive, Miami, FL, declare this to be my Will, and I revoke any and all wills and codicils I previously made.

ARTICLE I: Funeral expenses & payment of debt

I direct my executors to pay my enforceable unsecured debts and funeral expenses, the expenses of my last illness, and the expenses of administering my estate.

ARTICLE II: Money & Personal Property

I give all my tangible personal property and all policies and proceeds of insurance covering such property, to my husband, Tex. If he does not survive me, I give that property to those of my children who survive me, in equal shares, to be divided among them by my executors in their absolute discretion after consultation with my children. My executors may pay out of my estate the expenses of delivering tangible personal property to beneficiaries.

Note: You can view documents only if the software applications in which the documents were created are installed on your computer. For example, to view a DOC or DOCX file, Microsoft Word must be installed on your computer.

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5. Click the close button when you are done viewing the document.

Uploading documents to File Exchange

Follow these steps to upload files to File Exchange.

1. In the File Exchange screen, click the folder to which you will upload documents.
2. Click the **Upload** icon and then click the **Add Files** button.

Tip: Click the Upload icon again to cancel the upload.

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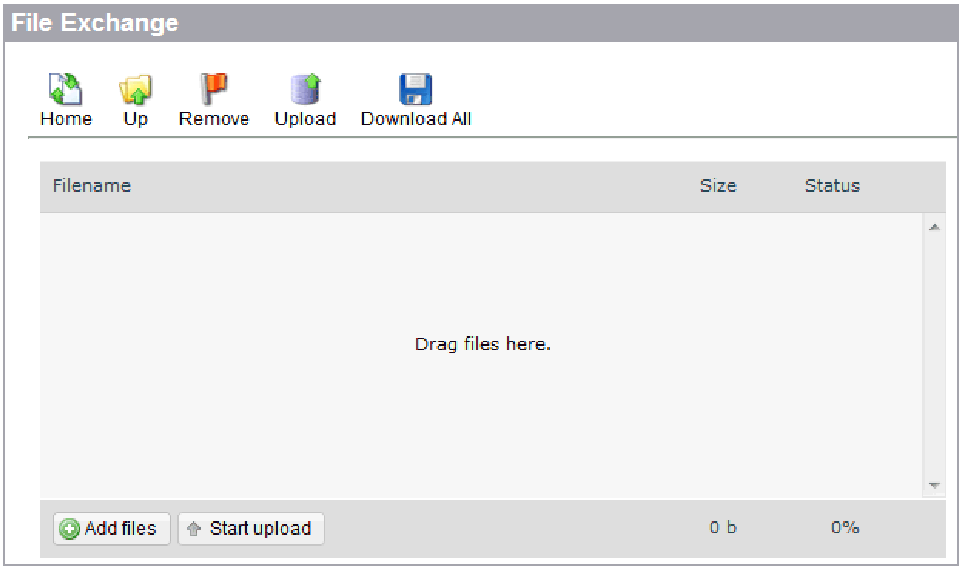
3. Click the **Add Files** button, navigate to the documents you want to upload, select them, and click the Open button.

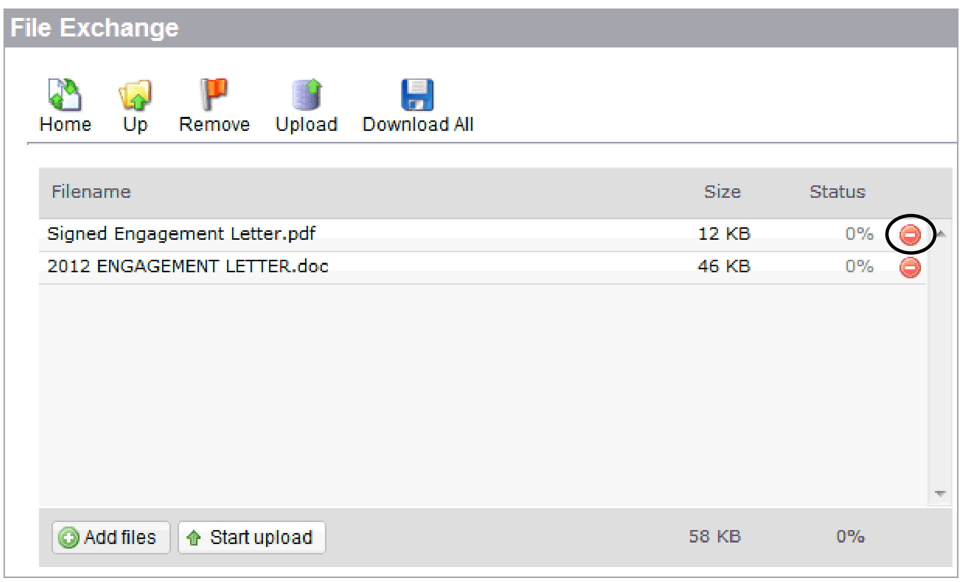
   We can now view the documents.
4. Click the **Log Out** link to log out of NetClient CS.

Additional information

- You can upload files of up to 2 gigabytes (GB).
- If your internet browser supports HTML 5, the words “Drag files here” appear in the upload section. You can upload files by opening Windows® Explorer, navigating to the files you want to upload, selecting the files, and dragging the files to the file list.



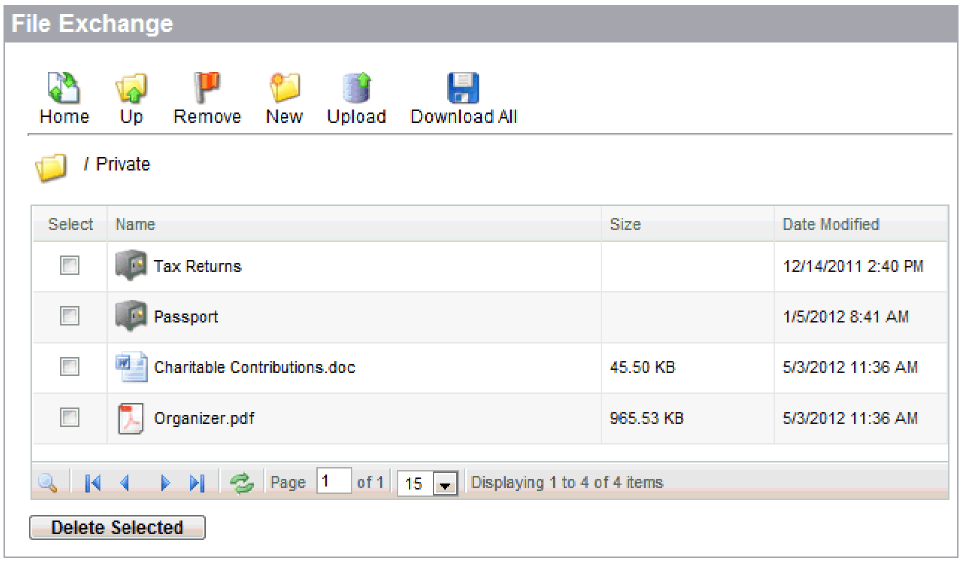
- To remove a document that you selected for upload, click the remove button to the right of the pending file.



Managing documents in the Private folder

You have additional options for managing documents in the Private folder.

- You can create subfolders by clicking the New  icon.
- You can delete documents or subfolders by marking the adjacent checkboxes and clicking the Delete Selected button.
- You can view the access history for a document by right-clicking it and choosing History.



Additional information

- You can upload any type of file to File Exchange, and you can view the file in its native format.
- If we set up File Exchange notifications for you, you will receive email messages to notify you when new documents are available in File Exchange.
- Please contact us to let us know when you upload files.
- We determine which files we will share with you through File Exchange. We can remove files from folders at any time.

Appendix: Our Contact Information

Record our contact information here in case you need to contact us with questions about NetClient CS, ClientFlow, or File Exchange.

Firm name: ____________________

Contact person: ____________________

Phone: ____________________

Email address: ____________________

Firm website: ____________________