

Client Portal User Guide

Easy, Secure and Simple File Transfers and Always-On Access to Your Information



ACCOUNTING | AUDIT | TAX | TECHNOLOGY CONSULTING | BUSINESS ADVISORY SERVICES

1. About the Ennis Pellum CPAs Client Portal

Our Client Portal is a simple and easy to use Web application that facilitates secure file transfers and continued access between Ennis Pellum CPAs and our clients.

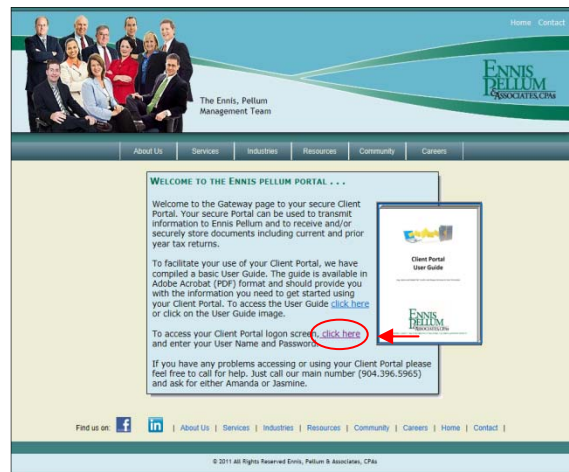
Your Portal User ID and login information for your personal and secure Portal account will be provided via email. All documents made available for continued access such as tax returns or financial statements will remain on your Portal for a stated period of time in accordance with Ennis Pellum CPAs’s record retention and Portal use policies.

2. Login to Your Personal Portal

1. Launch your Web browser and go to **www.jaxcpa.com**. Click on **Portal** in the top right corner of our home page (see left screen shot below). On the Portal Welcome page that follows (see right screen shot below), click on the hyperlink that directs you to the Client Portal login page.



Ennis Pellum CPAs Home Page – www.jaxcpa.com



Portal Welcome Page with Link to Login Page

2. On the main Portal Login page, insert your Login ID and password, as provided in the emails received from Ennis Pellum CPAs. Click the Login button.

* Login ID (Email address):

* Password:

Remember me

Remember my password

[Forgot your password?](#) [Forget me](#)

* Required Fields

Portal Login Page

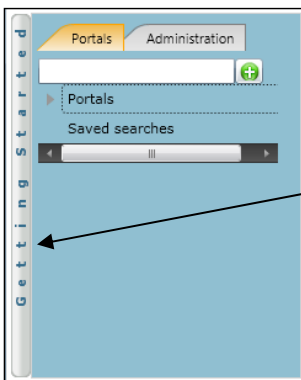
3. You’re now on your personal and secure Client Portal!



Login Tips

- Refer to the emails received from Ennis Pellum CPAs for login information.
- The Login ID (email address) is not case sensitive; the temporary password provided via email is case sensitive.
- For security reasons, you are required to change your password upon logging in for the first time.
- Your new password may be from 8 to 32 characters, must contain at least one alpha character, one numeric character, one special character (e.g. !, @, #, etc.) and is case sensitive.
- Your password may be reset at anytime by clicking “[Forgot your password?](#)”

3. Getting Started with the Portal

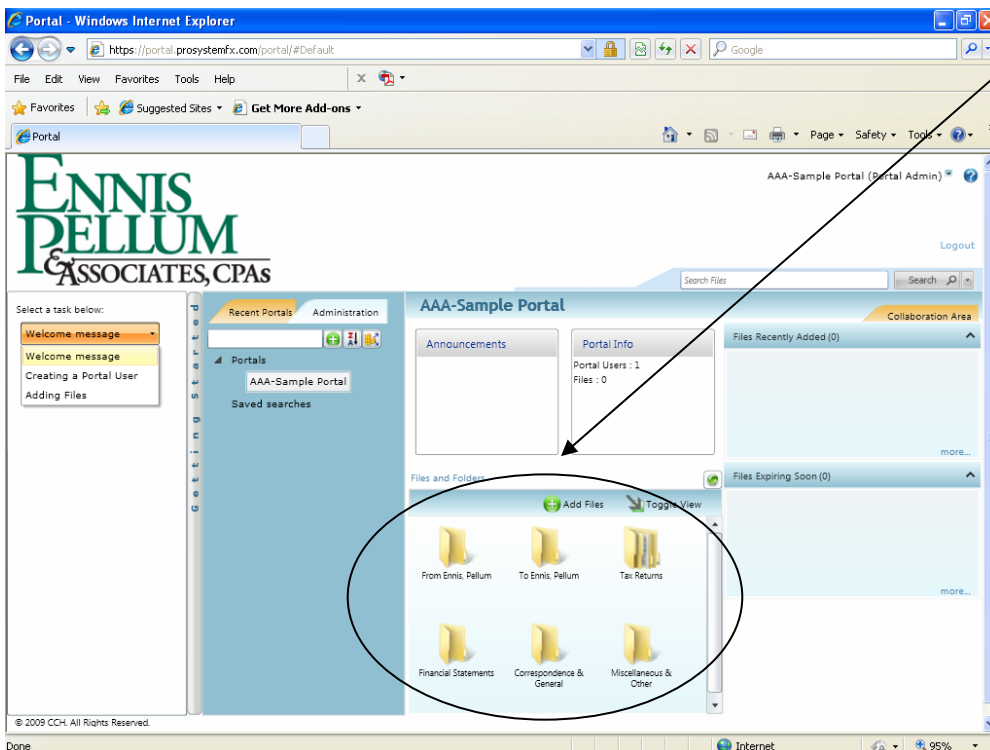


Getting Started menu



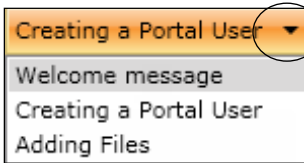
A short “**Welcome to the Portal!**” message will be presented on your initial login to the Portal. The welcome message simply directs you to the expandable/collapsible **Getting Started** menu. Click the **Getting Started** ribbon on the left side of the screen to expand and view this menu.

Each personal and secure Portal contains a mix of **Folders**. All information on your personal Portal is accessible only by Ennis, Pellum CPAs and the designated user(s). Working files are organized in **From Ennis, Pellum** (when the Ennis Pellum CPAs transfers files to our client) and in **To Ennis, Pellum** (for clients transferring files to Ennis Pellum CPAs). Historic files, such as tax returns and financial statements, are placed in the specifically created folders.



The main Portal account view with folders for organization of files

3. Getting Started with the Portal, Continued



Menu Selection

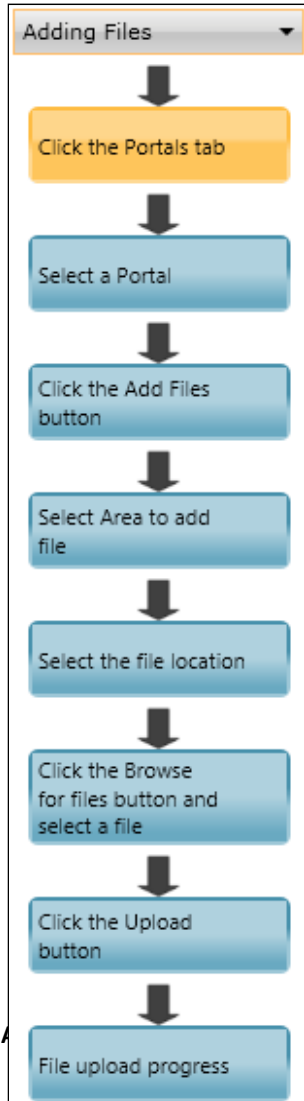


To view the Getting Started menu options (found below the Ennis Pellum CPAs logo), click the black arrow. This will reveal options for viewing the welcome message, creating a Portal User and Adding Files.

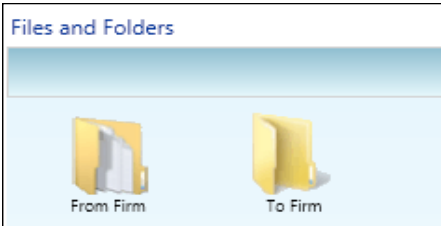


Getting Started Menu Key Features

- When clicking on the buttons, the respective feature in the Portal will begin to flash in order call attention to it.
- Perform the suggested (flashing) step, and then click on the next step to easily perform each step required to add files to the Portal.
- This feature is not only for informative purposes, it may be used to add files to the Portal for Ennis Pellum CPAs to view and use (e.g. Returns, Financial Statements).



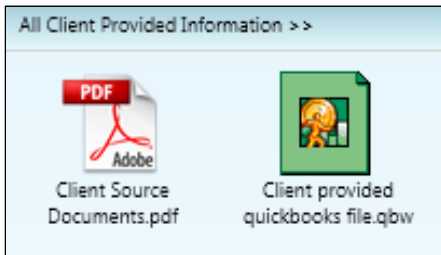
4. Download Files From the Portal



Files and Folders



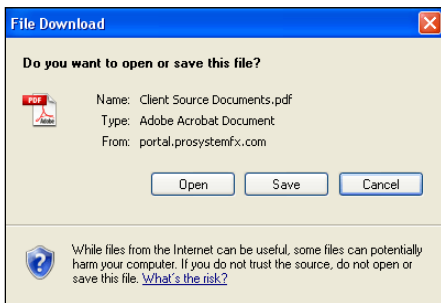
Simply double-click on a folder to view your files.



Portal Documents



A simple way to view or save a file is to double-click on the file name. Double-clicking on a file will display the **File Download Box**, displayed below.



File Download Box



Click **Open** to view the file or **Save** to download/save a copy to your computer or network. When a file is downloaded, a copy is created leaving the original in your Portal. If the file download screen does not display due to your browser's security settings, a small window will appear in the lower right portion of the screen allowing you to access the file.

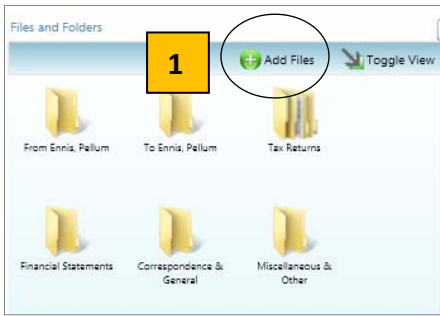


The File Download example displayed above refers to Internet Explorer. Other Web browsers may respond differently when you double-click on a file name, however, this will not affect your ability to access the file.



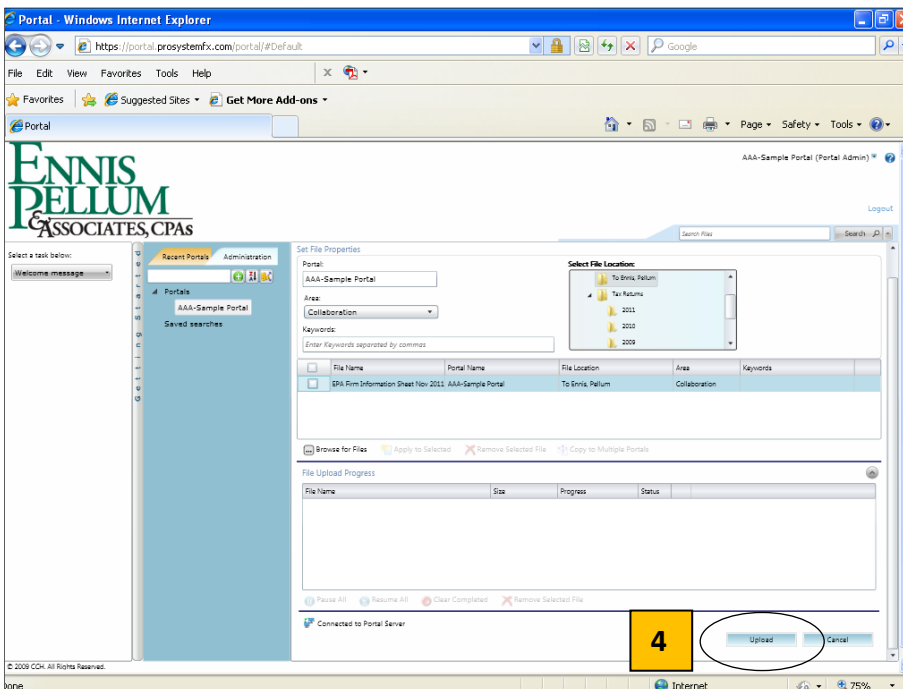
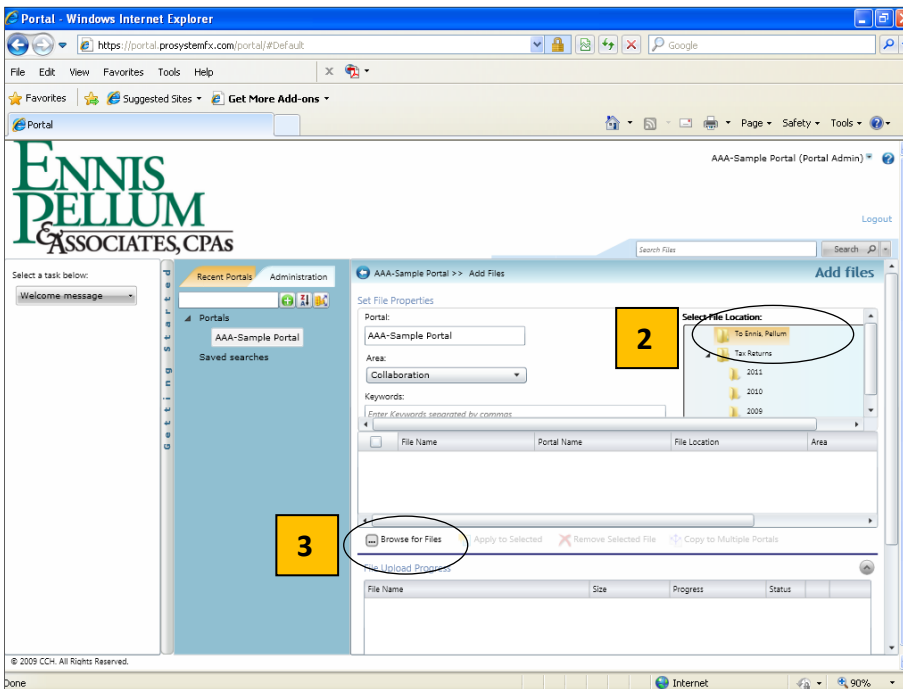
We recommend that you download (save) a copy of your deliverable items from the Portal, as most files will not remain there indefinitely. The firm can provide more detail regarding how long files will be accessible via the Portal.

5. Upload Files To the Portal



When uploading files to your Portal and to share with Ennis Pellum CPAs, please follow the below steps. The steps are also illustrated with orange numbers for easy reference:

1. Click **Add Files** on the main Portal window
2. Highlight the **To Ennis Pellum CPAs** folder under location
3. Select **Browse for Files**, attach the file and repeat for more files if appropriate
4. Click **Upload** to save the file(s) to the Portal.



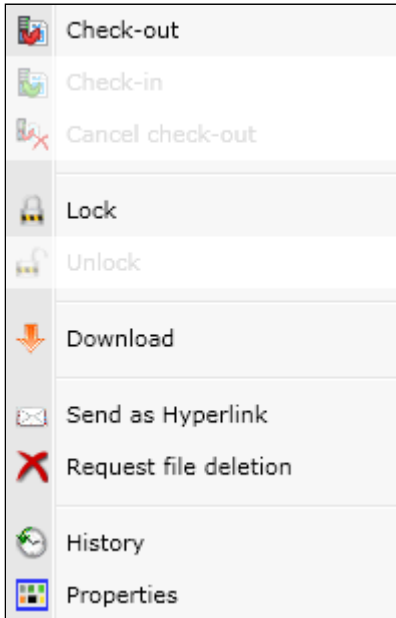
6. The Right Click Menu – More Features and Functionality



Right-click your mouse on any file to view the Menu for the file. The Right Click Menu contains a number of options for modifying and working with files.



Right Click Menu Key Features



Right Click Menu

Check-out	Check-out	Download the file to edit and add back to Portal. The file will be overwritten to reflect your changes upon Check-in. Certain files have limited editing capabilities.
Check-in	Check-in	Add the checked-out file back to the Portal to reflect any changes.
Cancel check-out	Cancel Check-out	This feature will make it as if the Check-out never occurred.
Lock	Lock\Unlock	Prevent file from being checked-out or deleted.
Unlock	Download	View or save file (same as double-clicking on file name).
Download	Send as Hyperlink	Send encrypted link via email. The recipient must be able to log-in to the Portal in order to view the file.
Send as Hyperlink	Request file deletion	Requests the file to be deleted by Ennis Pellum CPAs.
Request file deletion	History	View each action performed to the file and the user who performed the action.
History	Properties	Rename or change the folder location for a file.
Properties		

Sections 1 – 7 above introduce the main features and functionality of the Portal. As soon as your Portal has been created, you can begin to exchange files with Ennis Pellum CPAs without taking any additional steps.

As the primary user of your Portal, you have the option of providing others with access to your Portal. In the event that you wish to provide others in your family, organization or third parties access to your Portal, you are able to easily create other users from within your Portal. **Please consider the personal and confidential nature of the information in your Portal** before deciding to grant others access. To learn more about advanced features and adding/managing additional users, please see section 8 below.

7. Advanced Features - Adding and Managing Users

This section is intended to provide assistance on the more complex Portal features available to the Portal Admin user. The advanced features are **optional** and are not required for each Portal.

7.1 About Portal Users and Portal User Roles



- With every personal Portal, the primary user is automatically the Portal Admin. The Portal Admin performs all Portal-related functions, including adding other Portal Users and controlling ongoing access by other Portal Users.
- As a Portal Admin, you control who may access the Portal(s) that have been created for you or your organization. It is prudent to maintain strict control over Portal access by others, as documents on the Portal are likely to be of a sensitive nature. Portal Users should only be created when Portal access is required by more than one person. **Please consider the personal and confidential nature of the information in your Portal** before deciding to grant others access.
- If the firm has created more than one Portal for you, you will be able to control which Portal(s) your Portal Users may view.



As circumstances change, Portal access should be updated or completely terminated. The Portal Admin user and the Firm's admin account may terminate Portal access.

7.2 Examples of Advanced Portal Use

You may find situations in which it is practical to grant Portal access to a 3rd party - for example; a banker that you and the firm collaborate with on a regular basis. Before being granted access to the Portal; options to exchange information included email, fax, CD-ROM or paper. In many cases, you had to request the information from the firm before you could provide it to the bank, and vice versa. As the Portal Admin, you may create a Portal User for your banker allowing access to files and the ability to add files as requested; considerably reducing time and resources spent to exchange information. The level of security built into Portal far exceeds email and should replace it as the primary medium for electronic exchange of sensitive information. All files added to a Portal will be accessible by the firm, Portal Admin and any 3rd party Portal Users.

7.3 Creating Additional Portal Users

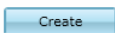
The Portal Admin may easily grant Portal access to others by creating Portal Users.



There are 2 steps to create Portal Users:

1. Assign Personal information
2. Assign Portal access and security



First, click **Manage Portal Users** from the **Administration** tab in the menu on the left hand side, and then click  at the bottom of the page.



Create Portal User



Assign Personal Information

1. In the Personal tab as illustrated above, enter the Portal user’s email address in the **Login ID** box
2. Select a Default **Security User Role** from the drop down menu
 - **Administrator** – Grants all rights of Portal
 - **Standard User** -Denies the ability to overwrite existing files, all other rights are granted
 - **Limited User** – Grants all rights except; overwrite existing files, lock/unlock files, and append to an existing PDF file
 - **Read-Only User** – Allows users to search for and view the file; its history and properties only
3. Enter the **Last Name** and **First Name** of the Portal User
4. Select the **Portal Access and Security** tab at the top of the screen

Portal Access	Grant Access	Access Expiration	Security User Role	Client Area
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Standard User	



Assign Portal Access and Security

5. All Portals that the Portal Admin has access to are displayed
6. Grant the Portal User access to the displayed Portal(s) by checking the box in the **Grant Access** column
7. The Portal User’s default security role will be selected; changing this role for specific Portals is optional

7.4 Edit Portal Users



Access to Portal may be modified or terminated at any time. It is important to terminate access when no longer needed by the Portal User. If you need assistance, please contact Jasmine Boucher or Amanda Libertone at 904-396-5965.

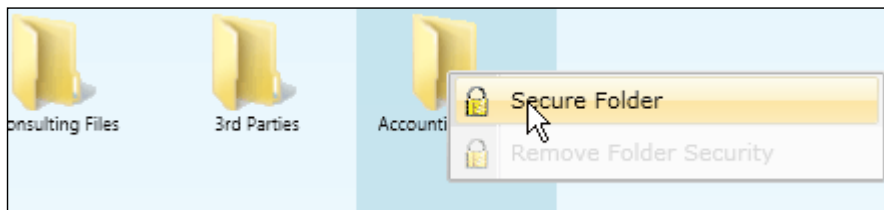
Edit Portal User



Click Manage Portal Users to edit or delete a Portal User. If access to the Portal is to be permanently terminated, simply click “Delete selected” to remove all Portal access.

7.5 Folder Level Permissions

Portal Admin Users have the ability to restrict specific Portal Users from accessing selected folders within Portal.



Secure Folder



Steps for Creating Folder Level Permissions

1. Right Click on the folder you wish to secure
2. Select **Secure Folder**
3. Choose Portal Users that will have rights to the folder by clicking the box to the left of the user’s last name

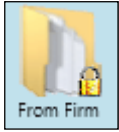
	Last Name	First Name	Email
<input checked="" type="checkbox"/>	Firm	Administrator	Nate.Brown@wolterskluwer.com
<input type="checkbox"/>	Nate	Brown	irish.nate.1979@gmail.com
<input type="checkbox"/>	Mary	Brown	mbrown.portal@gmail.com

Apply Folder Level Permissions to Portal Users

4. After selecting the Portal Users that will have access to the folder , click **Save**
5. A popup will display confirming the selected folder has been secured



To modify folder level permissions, right-click on a secured folder and select **Remove Folder Level Security**.



Secured Folder

Secured folders are easily identifiable as a lock icon is visible when navigating to folders on the Portal Homepage.

8. Portal Questions and Trouble-Shooting

If you need help with or have questions about your personal and secure Portal Account or how to use the Portal, we will be pleased to assist you.

Please contact Jasmine Boucher or Amanda Libertone with your Portal questions:

Jasmine Boucher
Tel: 904-396-5965 ext. 143
Email: jboucher@jaxcpa.com

Amanda Libertone
Tel: 904-396-5965 ext. 144
Email: alibertone@jaxcpa.com