



Portal Administrator and End User Guide

GUEST PORTAL ADMINISTRATOR GUIDE

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Internet Explorer Settings:

Pop-Ups

The portal website requires pop-up windows to be enabled in order to upload or move files and comments. Depending on the browser you are using and your security settings within that browser it may be necessary to enable pop-ups for the Website. It also may be necessary to add the website as a “safe zone” in order to view content from this site. As the portal works with several different browsers and versions of browsers it is difficult to provide a complete list of the possible steps needed to configure their Web browser.

In general, once the set-up of the Web browser is complete these settings will be saved by the browser, here are some examples of possible steps to allow pop-ups:

Google Toolbar



Security Certificate

As the portal website uses a Windows™ Security Certificate to enable encryption, on some machines it may be necessary to accept the security certificate to view the page. If a message regarding the security certificate is received, please accept the certificate and continue on to the portal website.

Browser Compatibility and Settings

The portal website is compatible with most versions of Internet Explorer and Mozilla Firefox. In some cases for all functionality to be allowed and most current security protocols to be in place, it may be necessary to update to the latest versions of these applications.

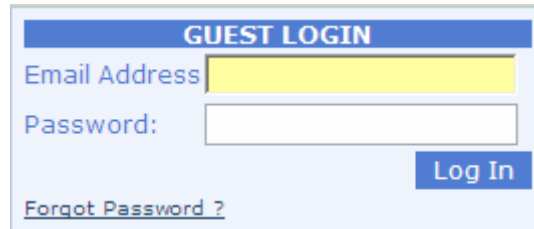
It is sometimes necessary to indicate to the browser application you are using that the website you are accessing is a trusted site or zone. Please contact the provider of the portal if you have any questions regarding access from this site. It is necessary to enable pop-ups to upload files or comments to the portal.

In addition, for e-mail notification from the portal to be received modifications to your e-mail settings may be necessary. Some e-mail providers automatically block e-mail delivered directly from Websites as spam or phishing messages.

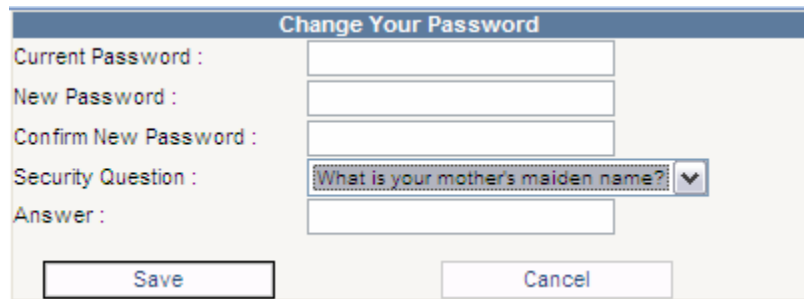
I. Logging In

Please refer to the e-mail titled “Welcome to Portal” for your User Name and Password Information. The User Name is your e-mail address.

When you click on the link to your portal, the following Log In Screen will appear:



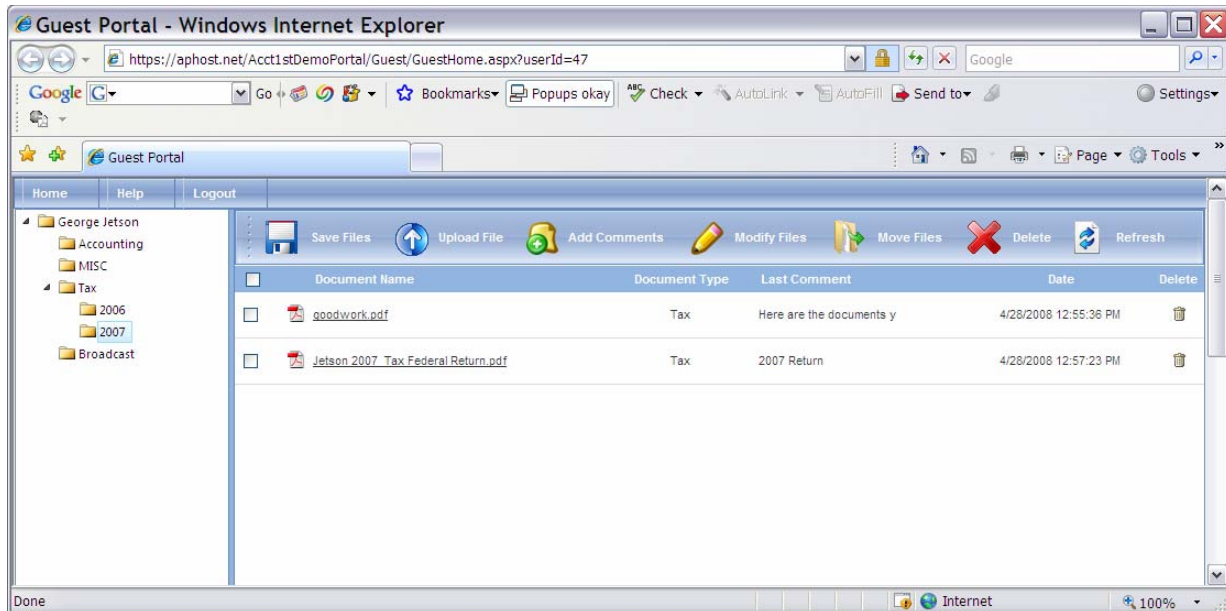
Enter your e-mail address and the password provided in your welcome e-mail. The initial password must be changed the first time you visit the portal, the first time you log in, the following screen will appear to prompt you to change your password:



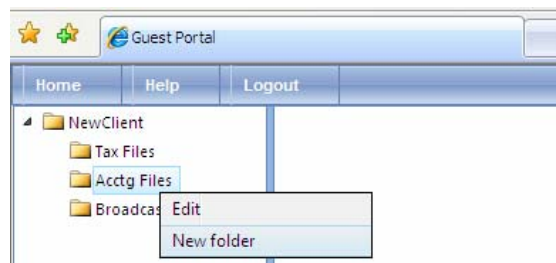
In order to retrieve your password at a later time, a security question and answer must be recorded by the system. The portal administrator may also send a copy of your password or reset your password at your request.



II. The Portal Interface



The left-hand panel contains a folder structure to allow you to organize the files you send and receive to and from the portal. You may right-click on a folder to edit the name, or to create new sub-folders for better organization.



While detailed folder structures do allow for better classification of files stored on the portal, it may cause some frustration to browse deep into file trees to locate a file. This is a personal preference of the user and the firm. A slow internet connection speed will result in more time for pages to refresh within a browser and for more time for information to be uploaded or downloaded through the system.

The main Window provides a list of all of the documents and files you are currently storing within the Guest Portal. In addition, the following buttons are provided to allow you to save, upload, delete, and modify any comments or files stored within the system.

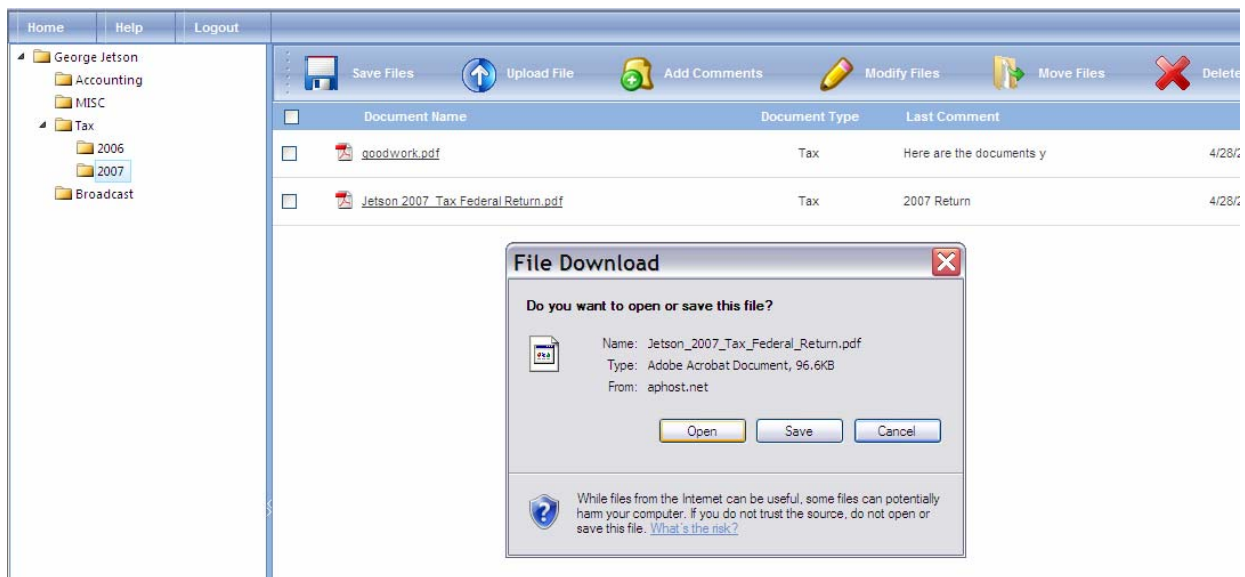


III. Working with Documents and Comments within the Portal

Document and File Options

Opening and Saving Files

Browse through the file structure to the file you wish to open or save, then click on the File Name and select open or save.



The file may be opened in its native format (the original file type) or saved to a specific drive on a user's computer.



The Upload File button allows new files to be delivered to the portal from your local drive. When you click on this button, the following screen appears:

https://aphost.net/?Nodeld=28 - Acct1st Portal->Add Document - Windows Internet Explorer

< ADD DOCUMENT:

Select a File:

Enter Comments:

Document Type: Tax

Select from the list for email notification:

- sales@acct1st.com
- staffemail@mail.mail
- tom@thomptest.com

Browse allows the guest to search their local drives for the file to be uploaded to the portal.

Enter Comments allows comments to be shared with Firm personnel.

The e-mail notification provides users the ability to notify any staff members when comments or files are uploaded to the portal.

The Create button begins the file transfer process. While the file is in process, you will see the following message flashing on the screen: **Please wait.....** Once the transfer is complete the Add Document window closes and a refreshed view of the Guest Portal showing the newly uploaded file is displayed.

Several services are available on the World Wide Web to test upload and download speed. If you are experiencing slow transfers we suggest you test your bandwidth and speed using a trusted source, such as www.dslreports.com/speedtest or www.speedtest.net or consult your current Internet Service Provider (ISP) for more information.



Modify Document allows you to browse your local files and switch a document stored within the portal with a document from one of your local drives.



Delete

Delete Selected removes any selected files.



Tax Return.pdf



Save Files

Selected File(s) may be individually saved or zipped and saved to a local file.



Add Comments

This button allows new comments to be uploaded to the portal. In addition, as new comments are uploaded staff members at the firm may be notified that comments have been uploaded to the portal.

When comments are uploaded a history of the comments and audit log is also available for viewing.

UPDATE COMMENTS:

Comments History:

3/3/2008 12:23:38 PM-tessdeg@acct1st.com::Return

New Comments:

Select from list for email notification:



Refresh

The refresh button will refresh your display with any updated information.

If you have any questions regarding the guest portal, please contact the portal administrator.