



**PRESTI & NAEGELE**

ACCOUNTING OFFICES   ACCOUNTING TECHNOLOGY CONSULTANTS

# Portal Client User Guide

## What is a Portal?

Portals are web-based applications that allow for the encrypted, bi-directional transmission and storage of electronic data. In other words, you have instant access to documents and information wherever and whenever you want. A portal, is a place where files can be uploaded, downloaded, stored and shared in a safe and secure environment — 24/7. Why is my accountant using a portal?

- It's easy to use — This user guide contains simple instructions, but if you've ever used online banking or email, you'll find your portal to be intuitive and easy to learn. Once we create your portal you will receive a few introductory email notifications with additional information and your specific login credentials.
- It's secure — Portals are the most secure way to exchange documents electronically. With identity theft on the rise, portals provide you with peace of mind knowing that the only person who can access your files is you and anyone you designate.
- It's convenient — Whether you want to locate last year's tax return or need to urgently upload a file to send our way, you can do so – anytime, anywhere, thanks to 24/7 access. You won't have to wait for the postal service or make a trip to our office — just log in and get to work. Share PDF files, Microsoft® Excel® spreadsheets, QuickBooks company files, Microsoft® Word documents, PowerPoint® presentations and financial software data files — and more!

## How Else Can I Use My Portal?

You have the capability to grant portal access to anyone — such as a banker who you may collaborate with on a regular basis. Prior to the convenience of portals, options to share information included email, fax, courier or postal mail. In many cases, you had to request the information from our firm before you could provide it to the bank, and vice versa. Portals have significantly reduced the time and resources spent on trading information.

Your portal will also allow you to:

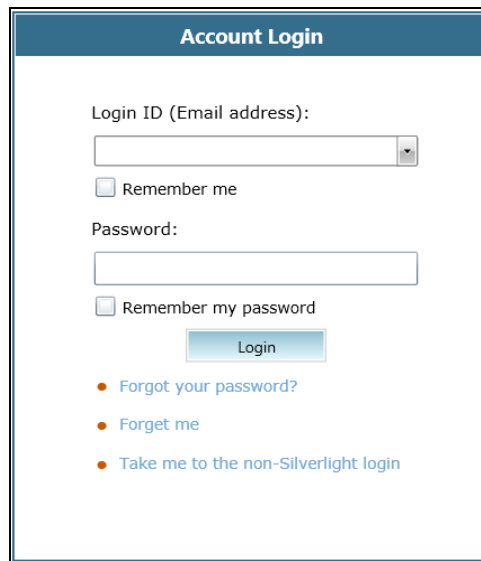
- Easily upload documents of all sizes
- Designate files as read-only or read-write — having the option to disable others from overwriting changes, for added security
- Search, sort and display documents based on a variety of characteristics

A portal will not only safely transmit your information but it will also help us foster better service, expanded communication and faster/easier access to the information you seek, at anytime.

## Quick Start Guide

### Portal Login

Launch your internet browser and browse to <https://portal.cchaxcess.com/portal>  
If you are using a MAC computer, please log on to the nonSilverlight version of portal :  
<https://portal.cchaxcess.com/sui>

A screenshot of a web form titled "Account Login". The form has a dark blue header with the title in white. Below the header, there are two input fields: "Login ID (Email address):" and "Password:". Each input field has a small dropdown arrow on its right side. Between the two input fields, there are two checkboxes: "Remember me" and "Remember my password". Below the password field is a blue "Login" button. At the bottom of the form, there are three links: "Forgot your password?", "Forget me", and "Take me to the non-Silverlight login".

Portal Login



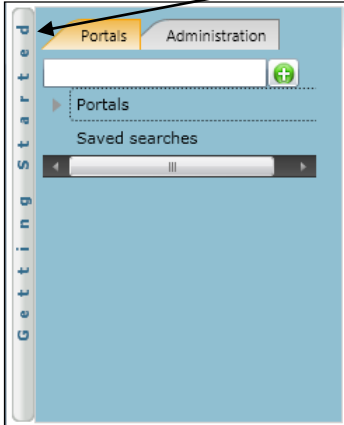
### Login Tips

- Refer to the emails received from the firm for login information.
- The Login ID (email address) is not case sensitive; the temporary password provided via email is case sensitive.
- You will be required to change your password upon logging in for the first time and answer at least one security question. Your security questions can help you access your portal if you ever forget your password.
- Your new password may be from 8 to 32 characters in length, must contain at least one alpha character, one numeric character, and one special character (e.g. !, @, #, etc.). The password is case sensitive.
- Your password may be reset at anytime by clicking “[Forgot your password?](#)”
- If you cannot, or prefer not to, install Silverlight on your machine, click “[Take me to the non-Silverlight login](#)” to use our lightweight version of the Portal that does not require Silverlight. Advanced features are not available from the non-Silverlight version of Portal. Alternately, you can access the non-Silverlight login page directly at <https://portal.cchaxcess.com/sui>.

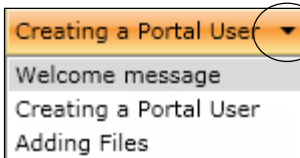
## Getting Started



A short “**Welcome to the Portal!**” message will be presented to each user upon their initial login to Portal. The welcome message simply directs users 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.



Getting Started ribbon



Menu Selection

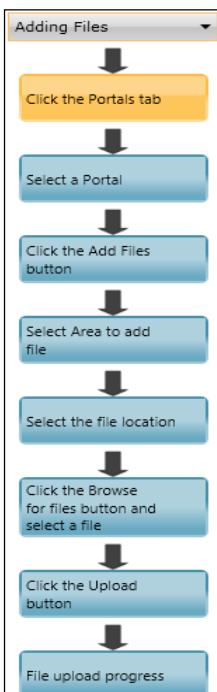


Click the black arrow to view **Getting Started** menu options. Creating a Portal User will only be visible Portal Admin users. **The Welcome Message and Adding Files will be visible to all Users.**



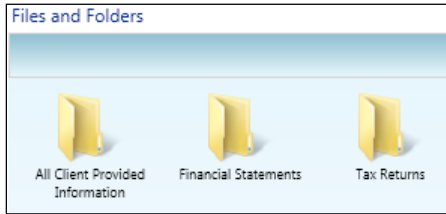
### Getting Started menu Key Features

#### Adding Files



- When clicking on the buttons, the respective feature in 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 Portal.
- This feature is not only for informative purposes, it may be used to add files to Portal for the firm to view (e.g. Returns, Financial Statements) are added to Portal

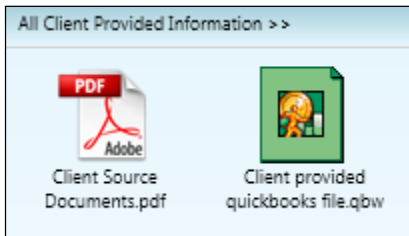
## Download files from Portal



**Files and Folders**



Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



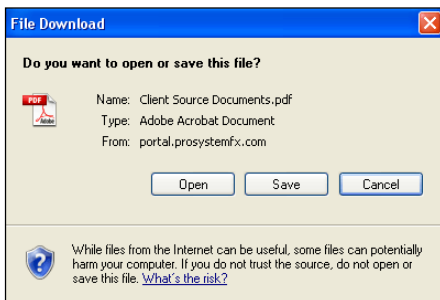
**Portal Documents**



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 screen, displayed below.



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 and does not affect the file on your portal.



**File Download**



It is recommended to download/save a copy of your deliverable items from Portal as most files will not remain there indefinitely. The firm can provide more detail regarding how long files will be accessible via Portal.

## The Local File Menu

- The Local File Menu contains several options for modifying and working with files.

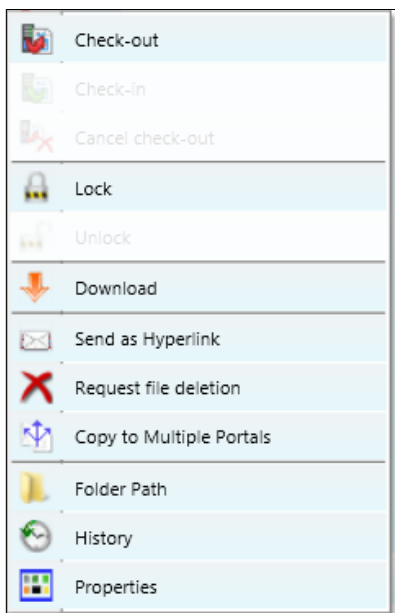


Right-click on any file to access the Local File Menu for that file.



### Local File Menu Key Features

#### Right-Click Menu



- **Check-out** - Download the file to edit and add back to Portal. The file will be overwritten to reflect your changes upon Check-in.
- **Check-In** - Add the previously checked-out file back to Portal to reflect any changes
- **Cancel Check-out** - Check-in a previously checked-out file as if the Check-out never occurred.
- **Lock/Unlock** - Prevent file from being checked-out or deleted.
- **Download** - View or save file (same as double-click on file name).
- **Send as Hyperlink** - Send encrypted link via email. The recipient must be able to log-in to Portal in order to view the file.
- **Request File Deletion** - Requests file deletion by the firm.
- **Copy to multiple Portal** - Copies a file to other portals that the Portal User has access to.
- **Folder Path** - Move file to a new folder.
- **History** - View each action performed to the file and the user who performed the action.
- **Properties** - Rename or change the folder location for a file

## Quick Reference Guide

### *Portal Login*

- Launch your internet browser and browse to <https://portal.cchaccess.com/portal>
- Enter your Login ID and your temporary password. These can be found in the email you received from the firm.
- You will be required to change your password upon logging in for the first time and answer at least one security question.

### *Add Files to Portal*

- From your portal Home Page, select a portal, if necessary.
- Select the folder where the uploaded files should be stored.
- Click the Add Files button to select files or drag and drop files from your computer to the selected folder location.
- Click the Upload Files button.

### *Download Files from Portal*

- From your portal Home Page, select a portal, if necessary.
- Select the folder where the files you want to download are located.
- Right-click the file and select Download.