

BST



NetClient CS

ClientFlow Portal

User Guide

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About ClientFlow Portal

ClientFlow Portal is a simple and easy to use Internet application which facilitates the sharing of documents between BST and our clients in a *secure* web-based environment.

System Requirements for using the ClientFlow Portal

To access and use the ClientFlow Portal, you need high-speed internet access and a computer running Internet Explorer (version 7.0 or higher) or Apple Safari (4.0 or higher), Mozilla Firefox, or the Google Chrome web browser.

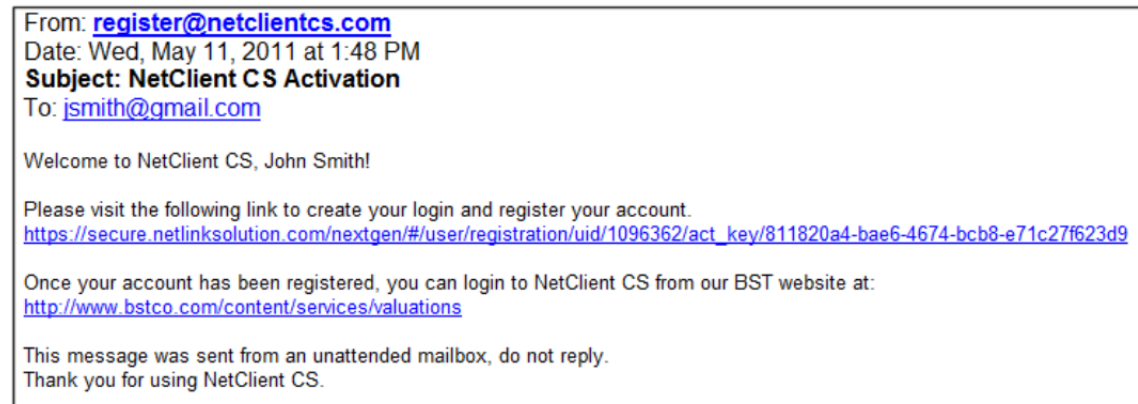
Accessing the ClientFlow Portal through your NetClient Account

Registration Email

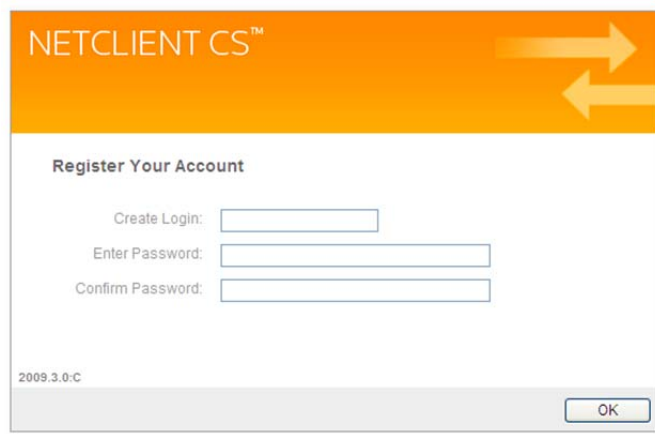
To access the ClientFlow Portal, a NetClient account has been created for you. You will receive a registration email from register@netclientcs.com with a subject line of NetClient CS Activation.

- 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.
- The email will contain a link that will take you to a page to create a login and register your account.
- If you cannot locate the registration email contact us and we can resend the registration email.

Sample NetClient Activation Email:



1. Once the email has been received, click on the first link to go to the registration website.

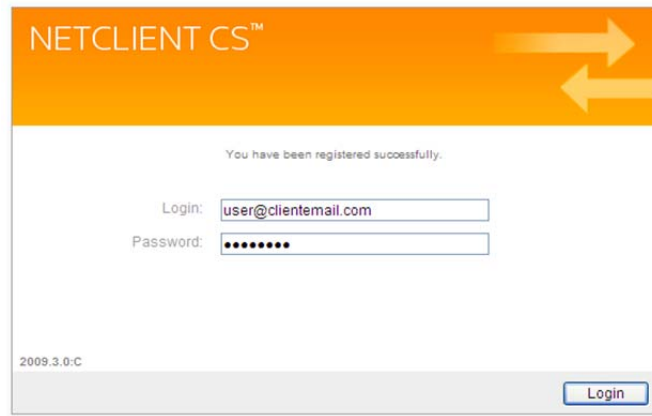


The image shows a screenshot of the NetClient CS registration form. The form has an orange header with the text "NETCLIENT CS™" and two white arrows pointing right. Below the header, the form is titled "Register Your Account" and contains three input fields: "Create Login:", "Enter Password:", and "Confirm Password:". At the bottom left of the form, the version number "2009.3.0-C" is displayed. At the bottom right, there is an "OK" button.

2. Follow these steps to create your login and password:
 - a. Enter a login name in the Create Login field. **Note:** Use your email address as your login!
 - b. Enter a password in the Enter Password field (see password requirements below).
 - c. Re-enter the password in the Confirm Password field.

Login and Password Information

- Use your business email address as your login.
 - Your password is case sensitive (e.g. PassWord1) and must be at least seven (7) characters long and must include letters and numbers (e.g. password1). You can also use symbols (e.g., %, \$, #)
 - If you forget your password, you can request to have a new temporary password emailed to you by using the [Help! I've forgotten my password](#) link (seen after a failed login attempt).
 - 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.
3. After successfully setting up your NetClient CS account, confirm your login credentials by logging into NetClient CS using the Login name and Password that you just created.



NETCLIENT CS™

You have been registered successfully.

Login:

Password:

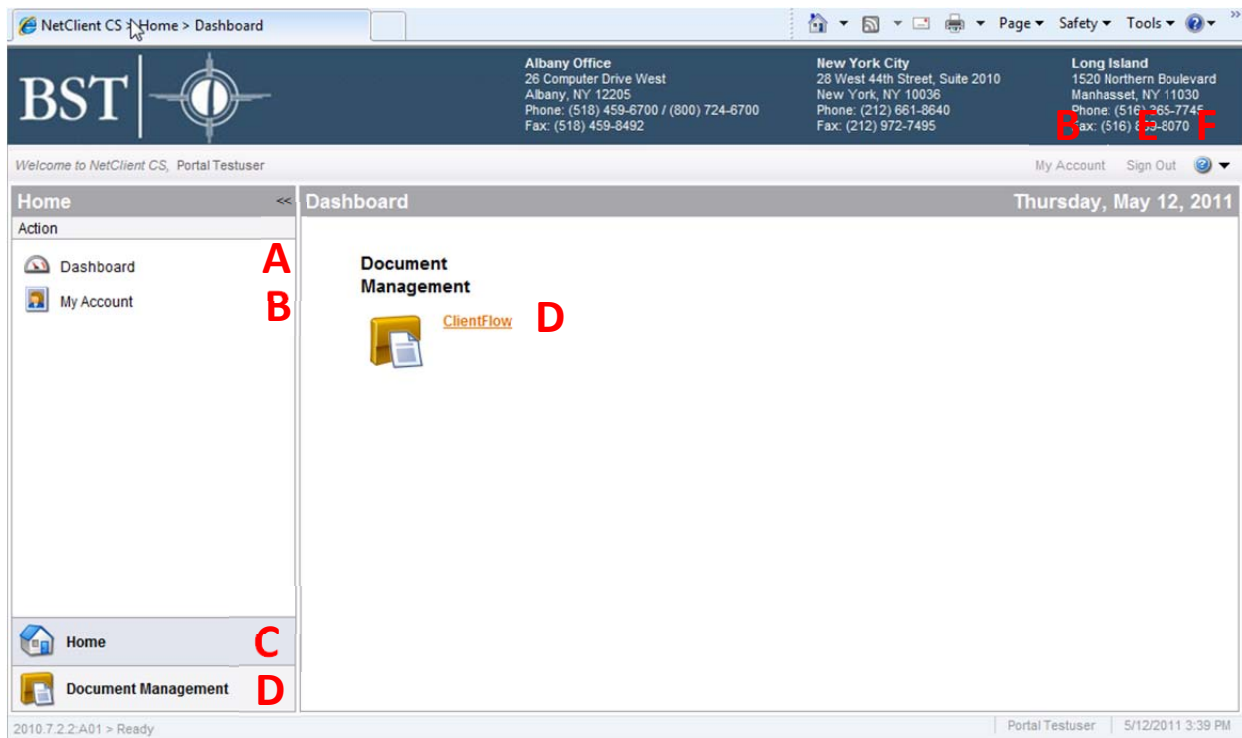
2009.3.0-C

Login

Note: For future access and to log into NetClient CS after this initial login, visit our website at <http://www.bstco.com/content/services/valuations>. Save this login page as a Favorite in your web browser.

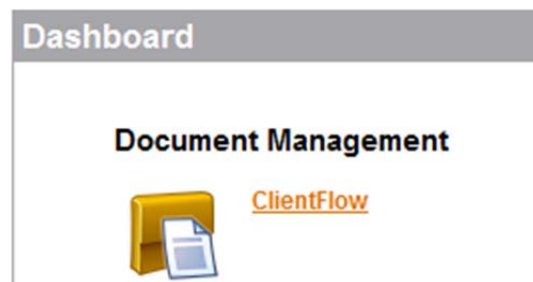
Navigating the NetClient Dashboard

Once logged in, the Dashboard page will be displayed listing the ClientFlow Portal module.



- A. Dashboard** – Allows you to view all applications you have access to in NetClient CS.
- B. My Account** – Allows you to view and update your Login, Name, Email Address, and Password. Also, Security Questions can be set up to simplify password resets if you should forget your password.
- C. Home** – Allows a user to return back to the Home view.
- D. Document Management / ClientFlow** – Allows you to enter the ClientFlow Portal to view files that have been published to your portal, and to upload your files to the Portal.
- E. Sign Out** – Allows you to sign out and end your session of NetClient CS.
- F. Help Menu** – Provides a menu of help topics for using NetClient CS

Click on **ClientFlow** to open the application.



Navigating the ClientFlow Portal

Click on the **Client Name** or **Client Number** to see documents published into that folder.

Note: The **_UPLOADED DOCUMENTS** folder is reserved for documents you want to upload to the Portal.

ClientFlow

Home Up

Find: Showing 74 of 74

Client Name	Client Number	Entity
SMITH V. JONES	1234.56	_UPLOADED DOCUMENTS
SMITH V. JONES	1234.56	TEST ENTITY
SMITH V. JONES	1234.56	GENERAL

ClientFlow

Home Up Upload

/ SMITH V. JONES

Find: Showing 6 of 6

File Section	Document Type	Source	Bates	Description	Document Date	Date Received
CLIENTFLOW	UPLOADED DOCUMENT...	SOURCE	BATES	A NEW RAINBOW HA...	05/12/2011	05/12/2011
ADMINISTRATIVE	CORRESPONDENCE	SOURCE	BATES	BST HUMAN RESOUR...	05/10/2011	05/10/2011
CLIENTFLOW	UPLOADED DOCUMENT...	SOURCE	BATES	GFR_NETCLIENT_CS...	05/11/2011	05/11/2011
CLIENTFLOW	UPLOADED DOCUMENT...	SOURCE	BATES	GFR_NETCLIENT_CS...	05/11/2011	05/11/2011
CLIENTFLOW	UPLOADED DOCUMENT...	SOURCE	BATES	GFR_PUBLISHING_AN...	05/11/2011	05/11/2011
ADMINISTRATIVE	RETAINER/ENGAGEM...	BST	NONE	RETAINER AGREEMENT	04/10/2011	05/10/2011

Portal Testuser | 5/12/2011 4:02 PM

- A. **Home/Up** – Allows a user to return back to the list of Client Names and Client Numbers.
- B. **Upload** – Allows a user to upload a document to ClientFlow.
- C. **Document Index Value Columns** – Allows a user to view the index values given to each document (your CPA firm gives these values to each document). Each column can be re-sized by clicking and dragging its border. **Documents can be sorted by column, by clicking the column header.**
- D. **Find:** Allows a user to narrow the document list by typing in a search parameter which will automatically narrow the list of shown documents. To see all documents again, simply delete the text from the field.

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

Viewing and Saving Published Documents in ClientFlow Portal

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

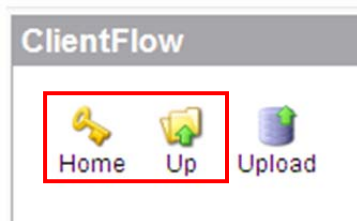
The screenshot shows the ClientFlow Portal interface. At the top, there is a search bar and a breadcrumb path: "/ SMITH V. JONES". Below this is a table listing documents. The table has columns for File Section, Document Type, Source, Bates, Description, Document Date, and Date Received. One row is highlighted with a red border, indicating it is selected. A red arrow points from this row down to a preview window of the document. The preview window shows the document content, which includes a header with placeholders for client and attorney information, a subject line "Re: [Matter Name]", a salutation "Dear [Client]:", and a paragraph of text starting with "This document will outline the terms of the retention of BST Valuation & Litigation Advisors, LLC ('BST') in the above captioned matter. The engagement entails the performance of a valuation of [insert scope of engagement].". At the bottom of the preview window, the text "DOCUMENT AND INFORMATION NEEDS" is visible.

File Section	Document Type	Source	Bates	Description	Document Date	Date Received
CLIENTFLOW	UPLOADED DOCUMENT...	SOURCE	BATES	A NEW RAINBOW HA...	05/12/2011	05/12/2011
ADMINISTRATIVE	CORRESPONDENCE	SOURCE	BATES	BST HUMAN RESOUR...	05/10/2011	05/10/2011
CLIENTFLOW	UPLOADED DOCUMENT...	SOURCE	BATES	GFR_NETCLIENT_CS...	05/11/2011	05/11/2011
CLIENTFLOW	UPLOADED DOCUMENT...	SOURCE	BATES	GFR_NETCLIENT_CS...	05/11/2011	05/11/2011
CLIENTFLOW	UPLOADED DOCUMENT...	SOURCE	BATES	GFR_PUBLISHING_AN...	05/11/2011	05/11/2011
ADMINISTRATIVE	RETAINER/ENGAGEM...	BST	NONE	RETAINER AGREEMENT	04/10/2011	05/10/2011

- Documents **opened** from ClientFlow are **READ-ONLY** and therefore cannot be edited and saved back to the Portal.
- To **edit** a document, open it and **save a copy to the local drive** (File / Save As). Edit it as necessary, and then upload it back to the ClientFlow Portal (uploading is discussed in the next steps).

Note: To open and view a document published to your portal requires the necessary software application to open and view the document. For example, if a document is a Microsoft Word file, you will need to have Microsoft Word installed to your local workstation to open and view the document.

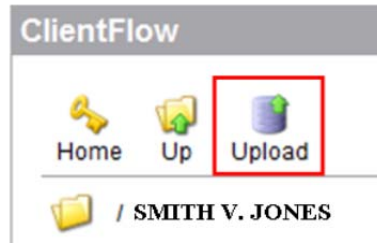
To navigate back to the main screen to see the listing of Client folders, click on the **Home** or **Up** icon.



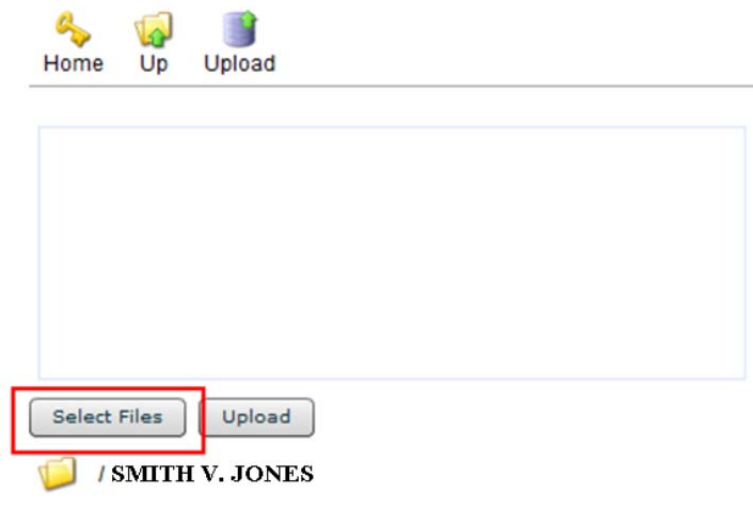
Uploading Your Documents to the ClientFlow Portal

Upload your documents into the UPLOADED DOCUMENTS folder.

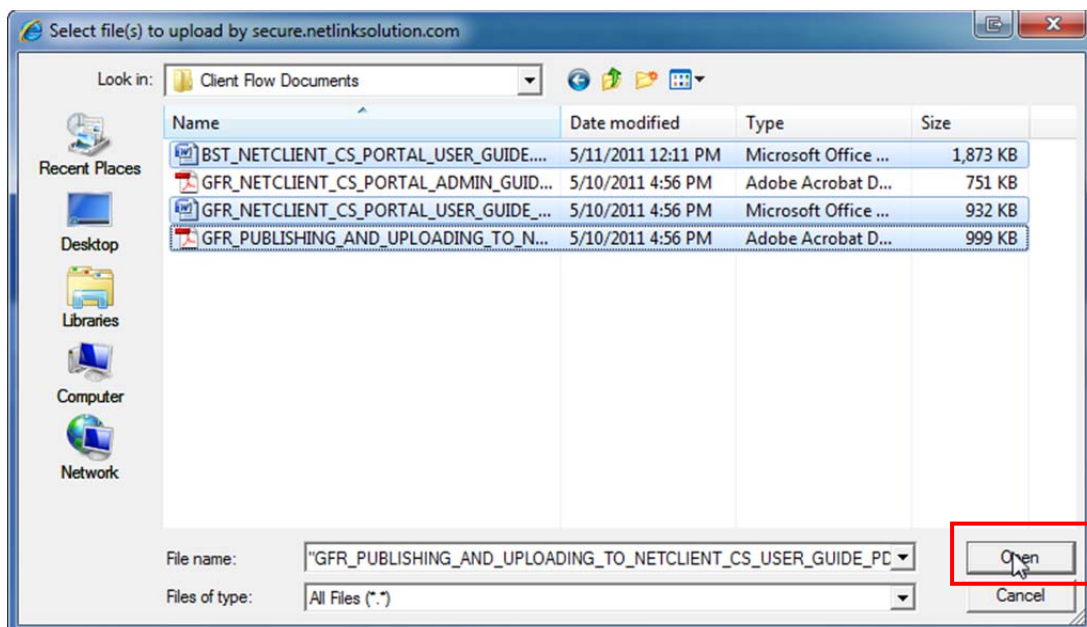
- a. Open the **UPLOADED DOCUMENTS** folder, and then click on **Upload** icon.



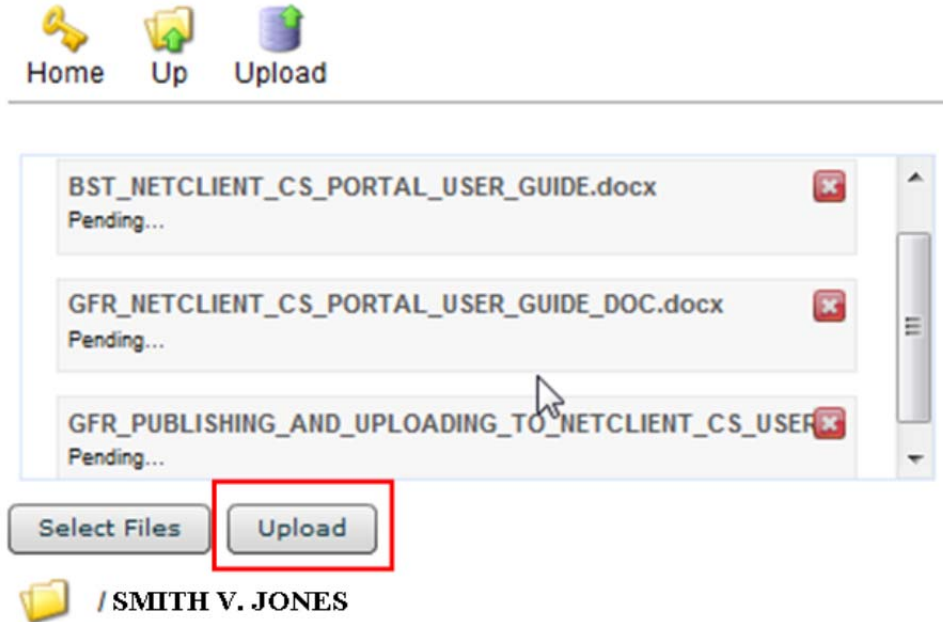
- b. Click on the **Select Files** button to browse to the document(s) on your PC that you want to upload to ClientFlow.




- c. In the **Select File(s) to Upload** window, find the document(s) you want to upload, select it and click on the **Open** button. You may select multiple files to upload. Hold the 'Ctrl' key while clicking to select multiple files.



- d. Files to be uploaded are then added to the Upload window. Click on the **Upload** button to upload the file(s) to the ClientFlow portal to make it viewable to BST professional staff.



Note: At any time prior to clicking the Upload button, documents selected for upload can be removed from the upload list by clicking the red  next to the file.

Note: At any time prior to clicking the Upload button, the Upload option can be closed by clicking the **Upload icon**.

Note: The UPLOADED DOCUMENTS folder will automatically have this user guide in it, so it can be accessed and viewed at any time.

Notes on Document Uploads to the ClientFlow Portal

- BST may not be automatically notified when you upload a document(s) to the ClientFlow Portal. Please contact BST by phone or via email when your document upload has been completed.
- Documents you upload to the Portal will be removed from the UPLOADED DOCUMENTS folder, and re-indexed into the correct Entity folder.
- BST determines which documents you can view by publishing them to the ClientFlow Portal. At any time BST can un-publish a document.
- Any type of document or file can be uploaded to the ClientFlow 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 to the ClientFlow Portal at one time.

Closing out of the ClientFlow Portal

To log-out after viewing or uploading documents, click on **Sign Out** to end your session.



Login Page / Email for Support of ClientFlow

Firm Website Login Page: <http://www.bstco.com/content/services/valuations>

Support Email: vflportalsupport@bstco.com

Note: BST support staff *does not* have your login and password information. If you are having difficulty logging in, you must use the [Forgot Password?](#) link from the Website login page listed above.

Note: The email support mailbox is monitored Monday through Friday between the hours of 9am – 4pm.