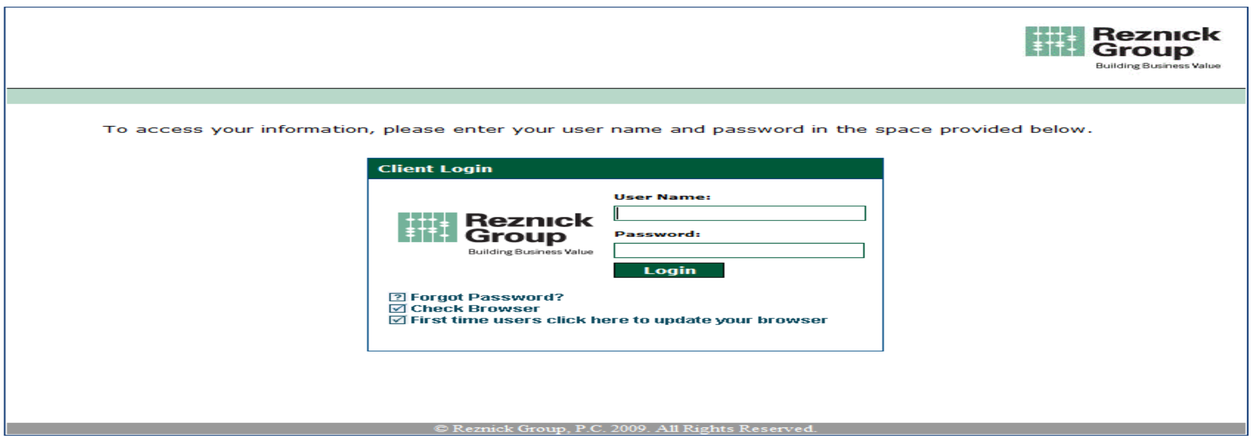
Clientflow Login Instructions

ClientFlow is accessible from the Reznick group website or going directly to the web address https://www.gofileroom.com/reznickclients/tier2.asp
You will receive a username and password via email to log in for the first time.
Your username will be your email address.



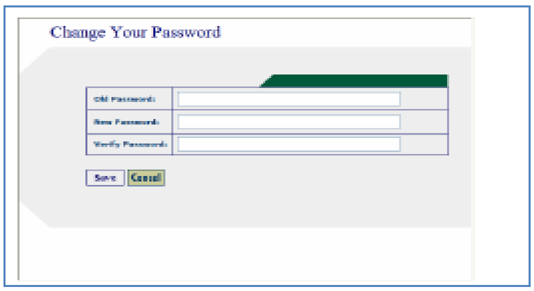
Browser Test

Before attempting to login for the first time, you should click on the "**First time users click here to update your browser**". This will run a quick diagnostic on your browser to make sure that you have the minimum version, and all of the necessary extensions. Everything on the right column should say "Yes".*
*Note - If you have a version of Acrobat higher than 6.0 installed, the column will say "No" as shown on the next page. This is not a problem and can safely be ignored.
* If anything that you do need is missing, you will receive a prompt to automatically install it at no cost.
When the browser settings have been confirmed, clicking on the "**Go Back"** button will bring up the login screen again.
Type in your username (your email address) and password (password1)
click **Login** button.

Changing a Password

This first time that you log into ClientFlow you will be prompted to change your password.
A new password must be chosen according to the GoFileRoom security policy:

1. Passwords must be alpha-numeric (utilizing both letters and numbers).
2. Passwords cannot match any of the previous ten passwords for a given user or contain a previous password (i.e. if your previous password was superman1, superman10 will not be accepted but superman2 will be accepted.)



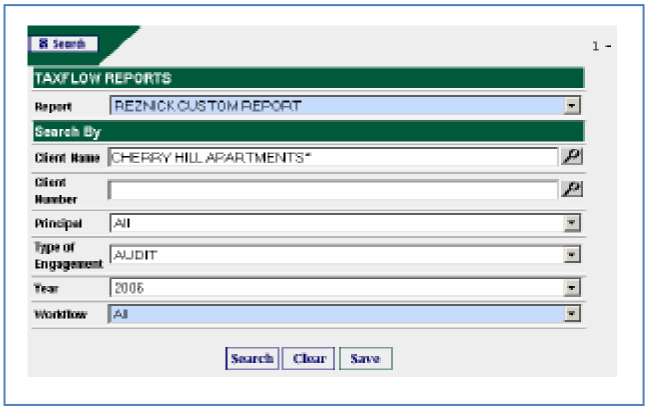
The Documents Screen

After changing your password, you will immediately be brought to a screen that displays a report listing the status of all of the work that we are doing for you and any documents that are available for you to view. Each of these fields can be sorted by clicking on the column header. This report is also exportable to Excel.

Searching

If the desired document is not on the first page, or you are looking for a specific type of document such as Audit or Tax, clicking on the "Search" button in the top left corner will launch the ClientFlow search function.

Searches can be run on any of the column headings. Enter an asterisk (*) as a wildcard for even more dynamic searching.



Viewing Documents

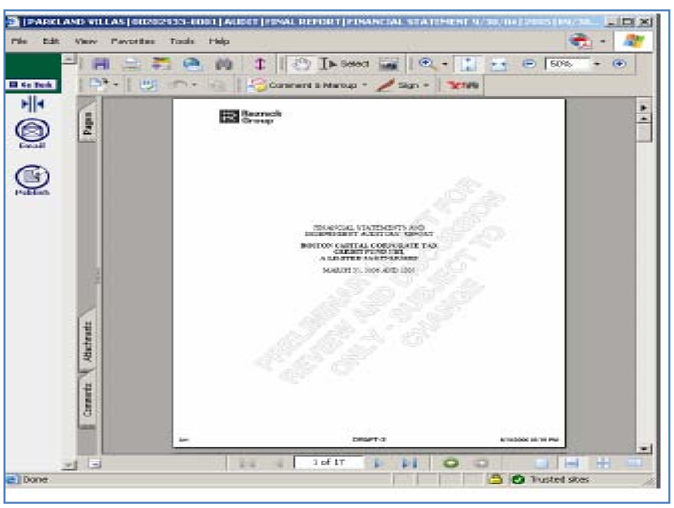
Documents can be viewed by clicking on the desired document. The document will be displayed in the browser, with a ClientFlow toolbar on left, and the document itself on the right.

From this screen, the document can be printed, saved, emailed, or published.

Printing or Saving a Document

Printing and saving are normal Adobe functions and are accomplished through the icons at the top of the screen.

From this screen documents can be printed, saved, emailed and/or published.



Printing or Saving a Document:

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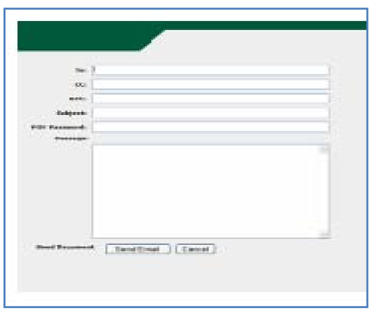
Printing:

Saving:

Emailing a Document:

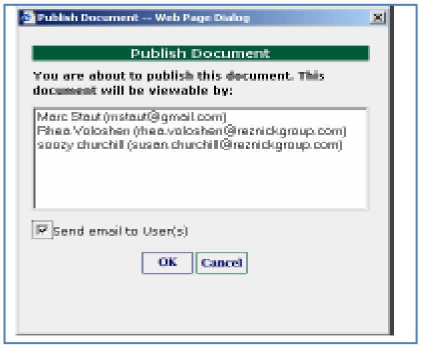
To email a document, click on the Email Icon. 
An email screen will pop-up.
Fill in the appropriate information and click “Send Email”



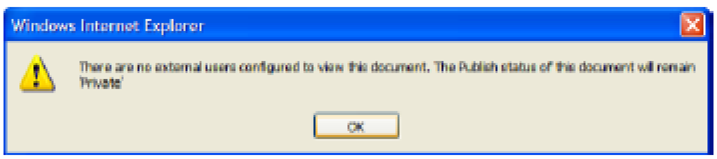
Publishing a Document to an Investor / Syndicator

With ClientFlow you are able to share your documents with the Syndicator/Investor when you decide by simply clicking on the Publish icon while you are viewing the document. It is on the toolbar on the left of the document screen.

A popup requires a click on “OK” to confirm that the document will be published to the list of users who you have given access to your “published” documents.



Another window will indicate that the document has been successfully published.
If there are no external viewers set up for that particular client, an error message will be generated.



In this instance, please contact Reznick Group to request that an account be set up for the Investor or Syndicator you are attempting to share information with.
Any documents that have been published will now show on the documents screen with an additional "p" next to their icon.

Un-publishing a Document to an Investor / Syndicator

If for any reason a document needs to be unpublished, the process is nearly identical.
After viewing the document, simply select the Unpublish icon on the left toolbar.
A confirmation window will confirm the success of the operation.

A confirmation window will confirm the success of the operation. Click OK