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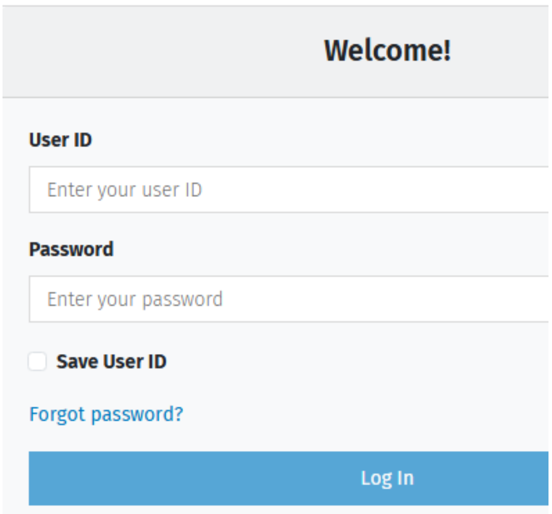
## Accessing the Client Portal

Bookmark the URL for the portal at our website https://reidadvisorsllc.com/client-portal/

Once on the portal page, click on CCH Axcess.

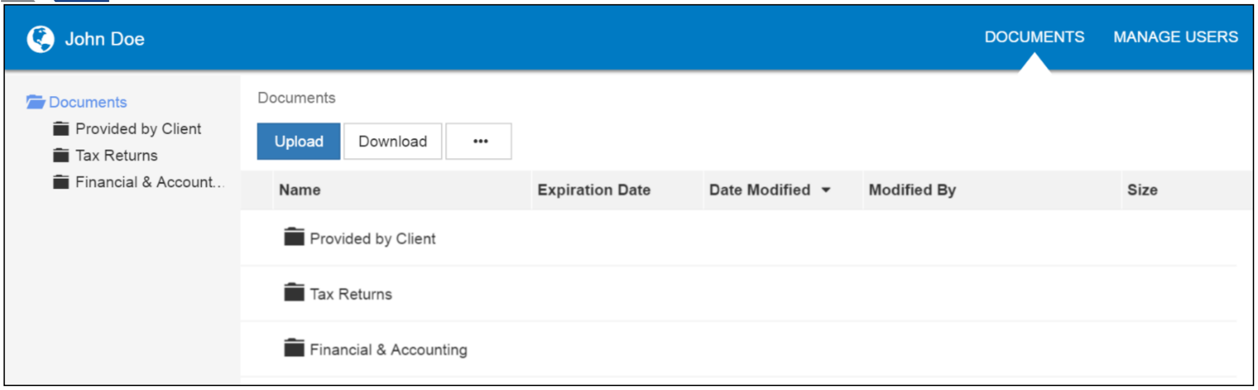
Refer to your welcome email for the temporary password needed for your initial login to Client Axcess.



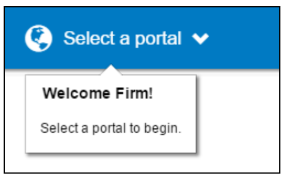

### Login Tips

- The Login ID (email address) is not case sensitive; the temporary password is.
- You will be required to change your password upon logging in for the first time and answer security questions. 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 any time by clicking “**Forgot password?**”.
- If prompted, review and agree to the [firm name] end user license agreement. You can also download a copy.

### Downloading files from Client Portal



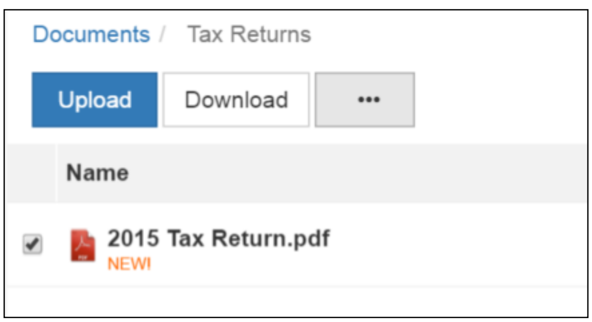

## Client Home Page




*Select a portal*

If you have access to more than one Portal, click **Select a Portal** at the top, left-hand portion of the page.

After logging in to Client Axcess, you will see a list of folders used to organize your files. **Click on a folder to display its files**.




## Download Files

To download a file, simply click the file name or check the box and click **Download**, either option will launch your browser's file download prompt allowing you to open or save the file.

- To download files, it may be necessary to disable your pop up blocker in Google® Chrome®, or other web-browsers.

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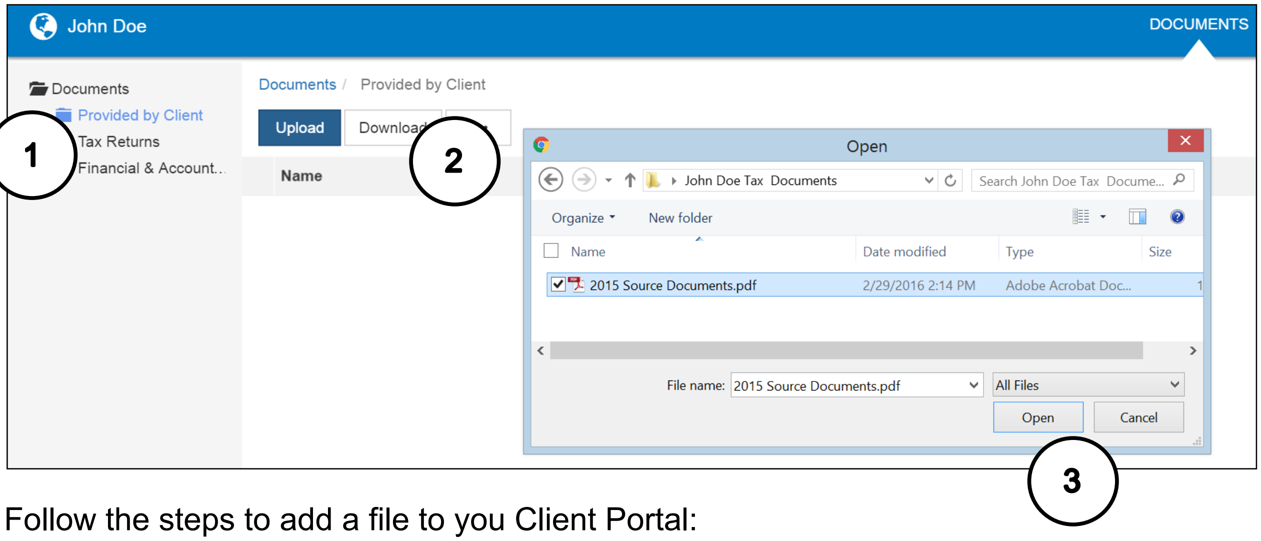
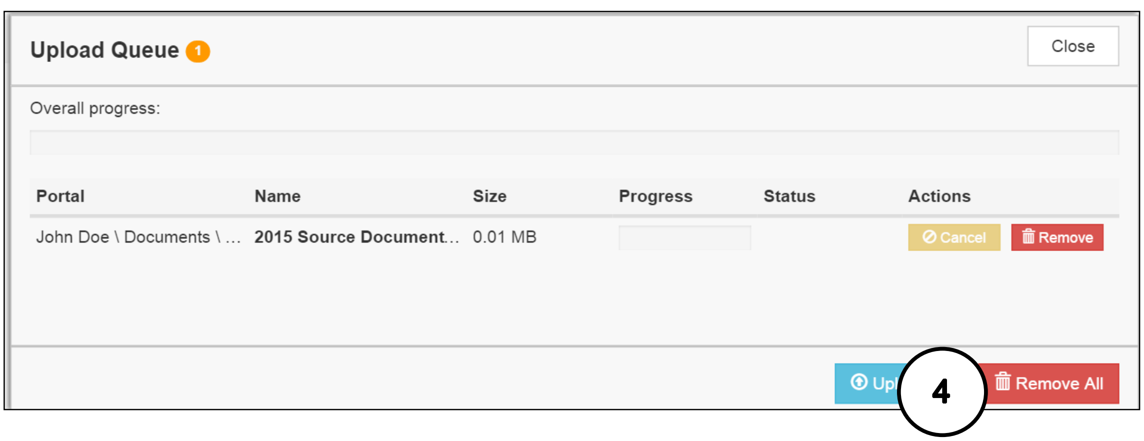
## Uploading files



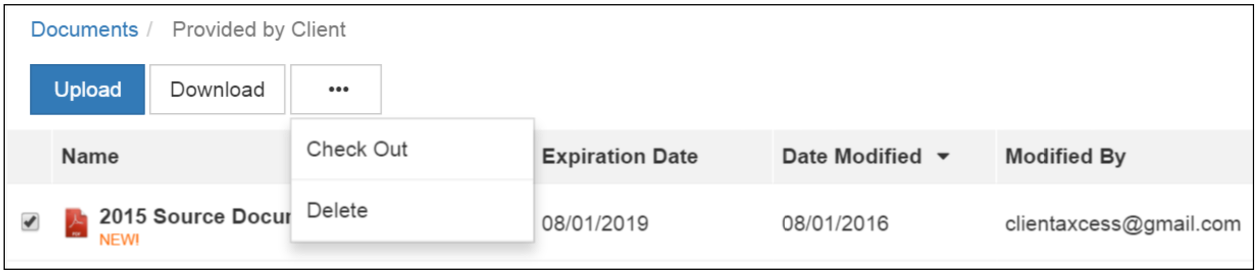

Follow the steps to add a file to you Client Portal:

1. Click the destination folder (where the file will be located)
2. Click **Upload**, browse to and select the file(s) you wish to upload
3. Click **Open**




4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s) to Client Axcess.
    a. You can also drag-and-drop files into the folder to activate the Upload Queue. Click **Upload All** and your files will be added.
        i. A confirmation that your file(s) were uploaded will appear.
    b. Click the  icon at the top, right-hand corner to open the Upload Queue if it is accidentally minimized before you have uploaded the documents.

# Working with Files in Client Axcess



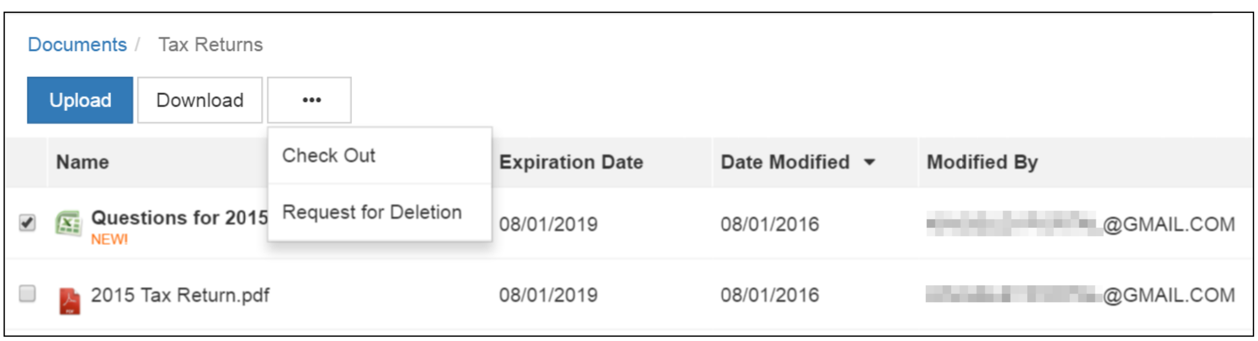

## Delete Files

You cann**ot** delete files uploaded by the Firm or other Portal users. You can delete files that you upload. Click the box to the left of the file name, click the **More Options** button, and then choose **Delete**. You will be prompted for confirmation, click **Yes** to remove the file from the portal.

If you would like to have a file added by [firm name] or another portal user removed from Client Axcess, follow the steps above, but choose the option “**Request for Deletion**”, which will be displayed instead of the Delete, and will email the Firm notifying us that you want the file to be deleted.

## Checking Out Files

Collaborate with the Firm by using the Check Out feature to download a file, make changes, and then add the modified file back to the portal. The file will be overwritten to reflect your changes upon Check In.



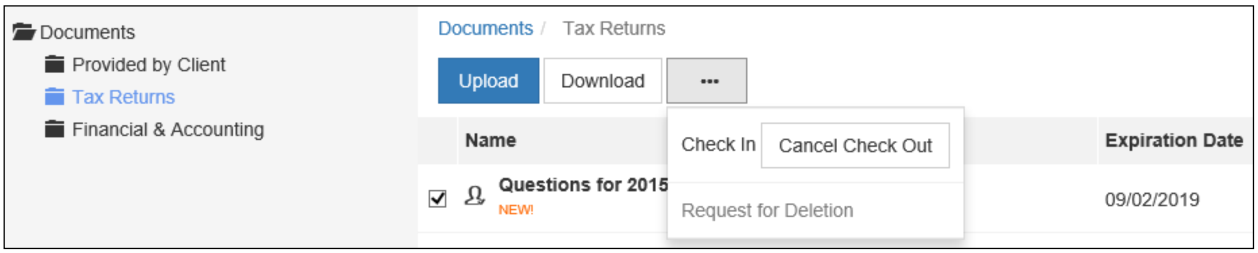

## Steps to Check Out a file

1. Check the box to the left of the file name, and then click the **More Options** button

2. Select **Check Out**

3. On the **Check-out** prompt, click the **Due date to check in** field, and choose the latest date you expect to Check In the file, then click **Check Out**
4. When prompted by your web browser, save the file to your computer or network
5. Launch the file and make any desired changes, then click **Save** and close

### Steps to Check In a file

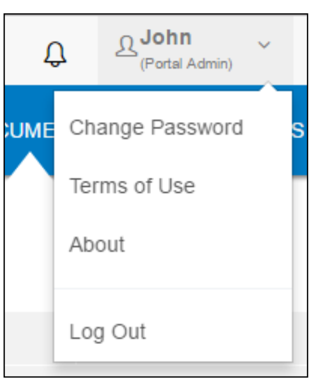



1. Check the box to the left of the file name and click the **More Options** button, and select **Check In**
2. When prompted, click Browse and navigate to the checked out file on your computer.
3. Click **Check In**
4. You will receive confirmation the file has been checked in successfully

### Changing Passwords and Logging Out

At the top right-hand portion of the page, click the arrow to view your user options. From this menu you can change your password or Log out of the portal.

### User Options

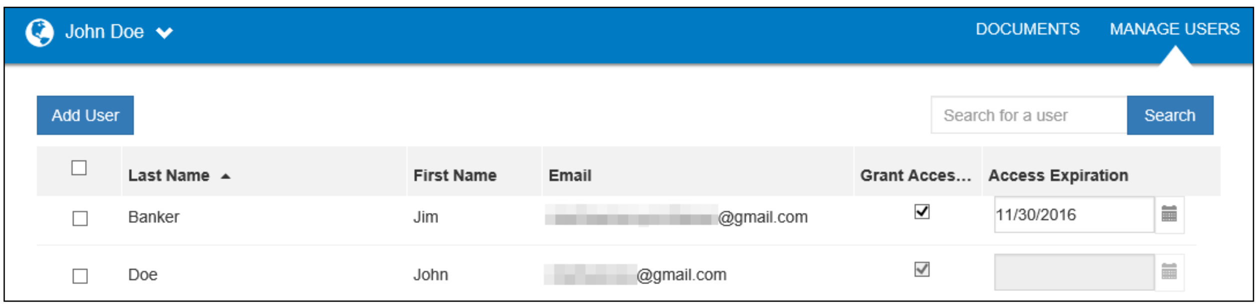


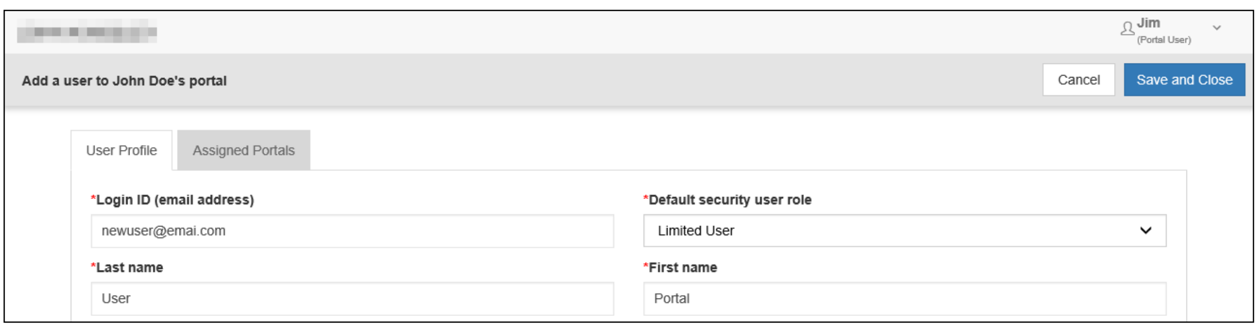
## Portal Admin

The Portal Admin is the primary user for each portal. The Portal Admin may perform all portal-related functions, create other Portal Users and control access for other Portal Users. The Portal Admin user will be the only user that exists initially when a portal is created by the Firm.

If you require additional users to have access to your portal, the Portal Admin may grant portal access to others by creating **Portal Users**.

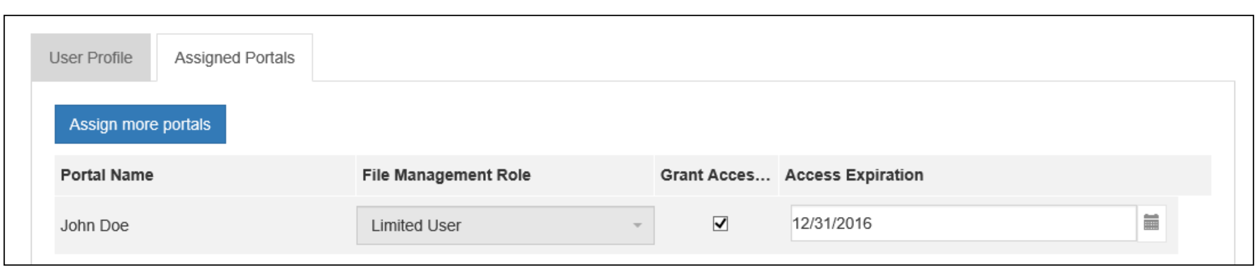
There are three steps to create Portal Users. From the home page, select **Manage Users** then click **Add User.**




1. On the **User Profile** tab, enter the Login ID (email address), last and first name of the user, and security role (see options below); these are required.

2. Grant the Portal User access to one or more portals by using the Assigned Portals tab.



3. You may choose the Portal User’s Role for each portal they are granted access

    i. There are five Roles that can be assigned to additional users.

1. **Administrator** – Allows Portal Users to perform all file operations.

    i. ***The Firm recommends that the account only have one designated Administrator***.

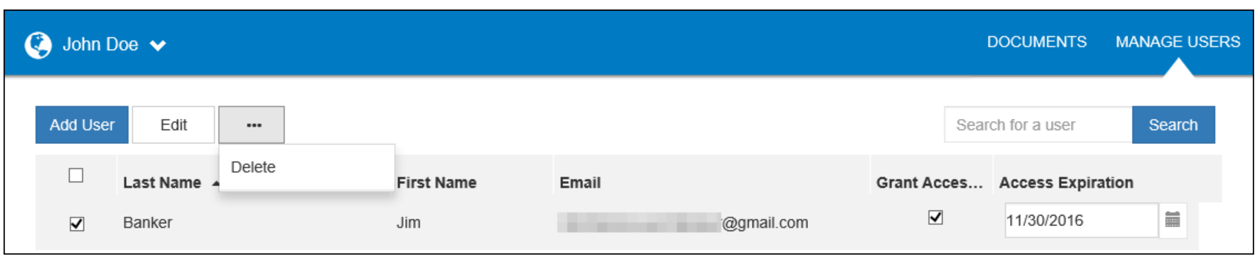
2. **Standard User** – Allows Portal Users to perform the most common file operations.

3. **Limited User** – Allows Portal Users to perform a limited number of file operations.

4. **Read-only User** – Allows Portal Users to download files and review related information.

*5.* **Upload-only User** – Allows Portal Users to upload files and review related *information.*

### Editing or Deleting Portal Users




Access to a Portal may be modified or terminated at any time. In the **Manage Users** window, click the box to left of the user’s name, and then click the **More Options** button to delete the user, or click the **Edit** button to modify.

- **It is important to terminate access when no longer needed by the Portal User. If you need assistance please contact the Firm.**