



Sabino & Company LLC
CERTIFIED PUBLIC ACCOUNTANTS • BUSINESS ADVISERS

Sabino & Company Secure Client Portal User Guide

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This document is intended for CCH Customers licensed to use CCH Axxess Portal. The document is a template ready for customers to customize and distribute to their clients. To begin, search for “FirmName” and replace with the actual business name. Customize the cover page and text within the guide as appropriate to meet your firm policies. After the guide is customized it is recommended that the final document be converted to a PDF file for distribution to clients. This document is composed of multiple parts including a quick start guide and an advanced section for clients with more complex portal requirements. Portions of this document may be delivered to clients based on their needs. Individual tax clients may only need the system requirements and quick start section, whereas business clients with more complex needs will benefit from the entire document.

Icon Legend	
	Keys Quick reference to the key aspects of a particular function
	Tip Best practice tips and shortcuts
	Notes Informational notes about functions
	Warning Important warnings about a function

About the Sabino & Company Secure Client Portal

At Sabino & Company, we take the privacy and security of your information seriously. That is why we use our Secure Client Portal for transmitting confidential tax and financial information with each client. A Portal User ID and login instructions are provided to each Sabino & Company client via email. All documents made available to each client on the Sabino & Company Secure Client Portal can be printed, transferred to another file on your computer, saved on the portal or permanently deleted by you as you see fit.

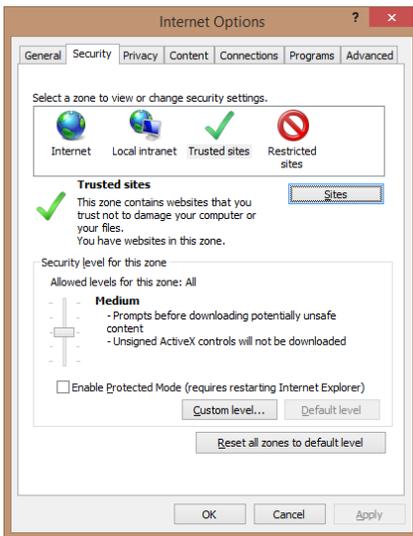
System Requirements

- Portal is built on a Microsoft Silverlight 4 platform and a user may be prompted to install Silverlight from Microsoft's website. The installation typically takes less than one minute to complete and is completely safe.
- Portal will support all browsers on PC and Mac that are compatible with Microsoft Silverlight 4.
- A complete list of browsers and operating systems that support Silverlight 4 can be found at <http://www.microsoft.com/getsilverlight/locale/en-us/html/installation-win-SL4.html>.

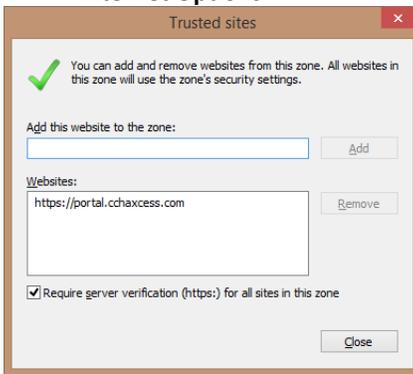
Internet Explorer



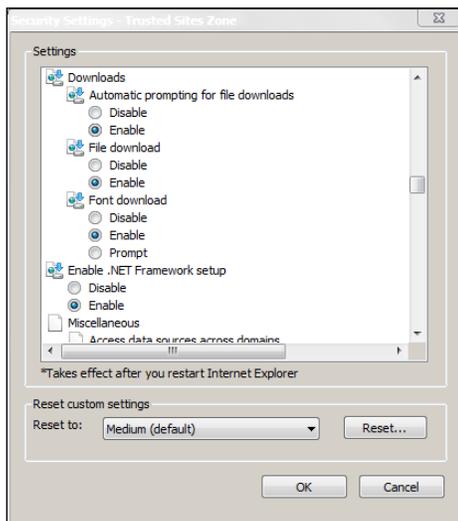
Internet Explorer users are required to add the portal URL to Trusted Sites.



Internet Options



Trusted Sites



Custom Level



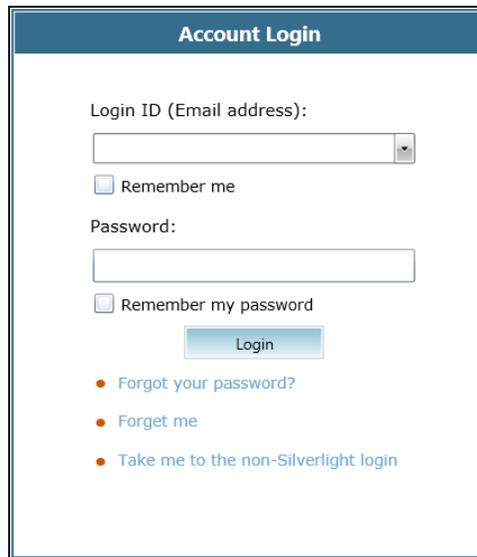
Internet Explorer Settings

1. Open Internet Explorer and browse to <https://portal.cchaccess.com/portal>
2. In Internet Explorer, select Tools, Internet Options, and Security, then click Trusted Sites. See #3 below for the final step.
3. Click Add to move the Portal URL to the trusted sites zone, then click close.
4. Click **Custom level**.
5. Click **Enable** for Automatic prompting for file downloads.
6. Click **Enable** for File Download.
7. Click **OK** to save the changes.

Quick Start Guide

Portal Login

Launch your internet browser and browse to <https://portal.cchaccess.com/portal>



The screenshot shows a web form titled "Account Login". It contains the following elements:

- A label "Login ID (Email address):" followed by a text input field with a dropdown arrow on the right.
- A checkbox labeled "Remember me".
- A label "Password:" followed by a text input field.
- A checkbox labeled "Remember my password".
- A blue "Login" button.
- Three links with orange bullet points:
 - [Forgot your password?](#)
 - [Forget me](#)
 - [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.cchaccess.com/sui>.

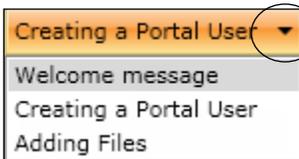
Getting Started



Getting Started ribbon



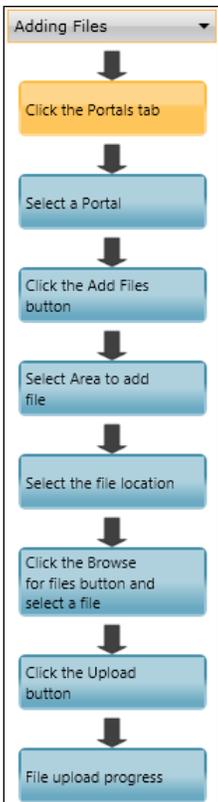
A short “**Welcome to the Portal!**” message will be presented to each user upon their initial login to Portal. The welcome message simply directs users to the expandable/collapsible **Getting Started** menu. Click the **Getting Started** ribbon on the left side of the screen to expand and view this menu.



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.**



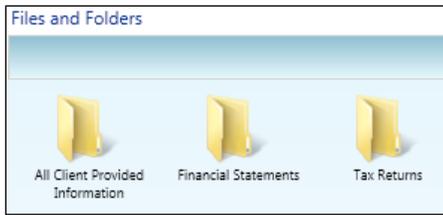
Adding Files



Getting Started menu Key Features

- 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.

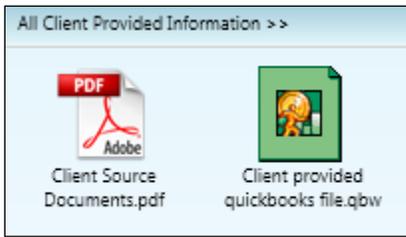
Download files from Portal



Files and Folders



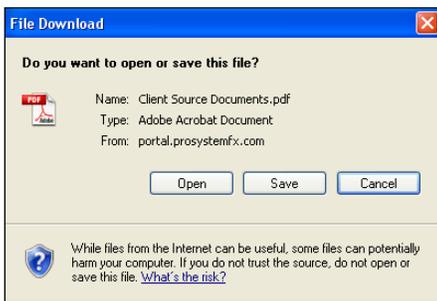
Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



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.



File Download



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.



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.

Add Files to Portal

Recent Portals

Enter portal name

Portals

1 Smith Properties, LLC

Saved searches

Smith Properties, LLC

Announcements

Portal Info

Portal Users : 3
Files : 0

Files and Folders

Tax

3 Add Files Upload Files View

2 Smith Properties, LLC

Tax

Accounting

2012 Tax Documents.pdf

4

Connected to Portal Server

Add Files



Steps to Add Files to Portal

On the Portal Home page:

1. Select a portal (only for those users that have access to multiple portals)
2. Select the file location (folder)
3. Click  to select file(s) via Windows Explorer or Drag and Drop files from your computer to the Files and Folders section
4. Click  to upload the file(s) to Portal