RS&F'S PORTAL USER GUIDE

REGISTERING YOUR PORTAL ACCOUNT

You will receive a registration e-mail from donotreply@rsandf.com. Once you receive the e-mail, go to the registration website by clicking the "Register" link in the e-mail

Enter your e-mail address as your user login. Enter a password in the "Create Password" field and confirm password in the "Confirm Password" field. Click "Register"

To confirm a successful registration, enter your login (e-mail address) and password created previously to access your portal. Click Login

ACCESSING UPLOADED DOCUMENTS

To access your tax documents via ClientFlow, click on the folder "ClientFlow Folder" on the left hand side of the home screen.

Click on the Client Folder for which client you want to view the document. All clients you have accessto will have a separate folder

Click on the document to open. Depending on your internet browser, a PDF file will either 1) download to your computer for you to access, or 2) open inside the web browser to view.

UPLOADING A SINGLE DOCUMENT

To upload a document to your ClientFlow portal, click "Upload" from the selected client folder.

Choose "Add Files," Then choose the location on your computer where the document is located and select it.

Once the document is populated in the upload screen, click "Start Upload."

UPLOADING MULTIPULE DOCUMENTS

To upload multiple documents, we ask you create a .zip folder containing all files you wish to upload to RS&F. Please see our "How To" Guide

CREATING A ZIP FILE

Locate the files or folder that you want to zip.

Right-click the files or folder, select Send to, and then select Compressed (zipped) folder.

A new zipped folder with the same name will be created in the same location