

# NetClient CS Portal®

## Client File Exchange and Document Viewing Procedures

### Overview - Document Types

The File Exchange function of your client portal allows sharing of information between clients and The Dental Group LLC.

When you initially log in to your portal, under the heading of Documents at the left side of the screen, you will see an icon named File Exchange and possibly one or more folder icons with your name or business name (Document Presentation folders).

After clicking on the File Exchange icon, you will see folders for newsletters and various resources. You can view, download, and print these files at any time. You will also have an icon indicating permission to upload documents requested by The Dental Group LLC.

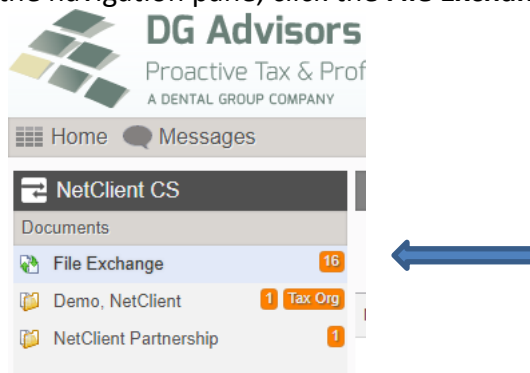
The Document Presentation Folders with your name or business name will contain published tax documents that we have made available to you for viewing or printing only.

### Viewing and Downloading File Exchange Files

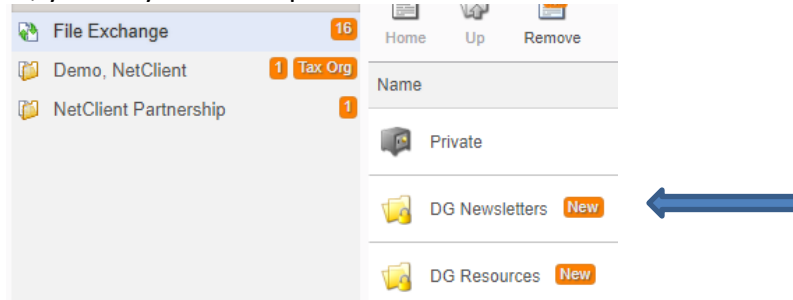
If new files are available in File Exchange, a New indicator appears to the right of the folder and file names. The indicator is removed once documents are viewed.

To view, download, and print files from File Exchange, follow these steps.

1. In the Documents section of the navigation pane, click the **File Exchange** link.



2. In the File Exchange screen, click the folder that contains the file you want to view. Depending on the folder structure, you may need to open sub-folders to access the file.



**Note:** If you are unable to find a file within the File Transfers folder, the file transfer location might have expired, which causes NetClient CS to delete the folder and the files it contains. Refer to the email message that you received from our firm about the file transfer to determine the date on which the location was set to expire.

3. Do one of the following.
  - To view a file in any folder, click the name of the desired file. Depending on how your computer is configured, you will be prompted to either save or open the file.
  - To download multiple files from a folder, including any files in subfolders within the folder, click the Download All button at the top of the File Exchange screen. NetClient CS creates a ZIP file that you can save to your computer or to a network location.

**Tip:** If you cannot see files that were uploaded for you, you might need to delete your temporary internet files or cached files.

4. After you open a file, you can print it or download it by choosing Save As from the File menu and navigating to the desired folder.
5. If Sign and Reject icons appear to the right of the file in the File Exchange screen, review the file and click the Sign icon to sign the file electronically or click the Reject icon.

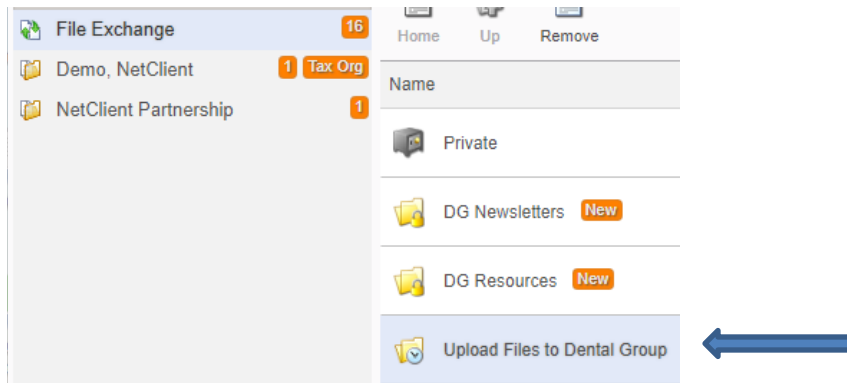
**Tip:** To move backward through the folder structure, click the Up icon. To return to the original view, click the Home icon.

- **Note:** If you need to make changes to and/or upload the file back to your portal, you must download the file to your computer before making any changes to it.

## Uploading files to File Exchange

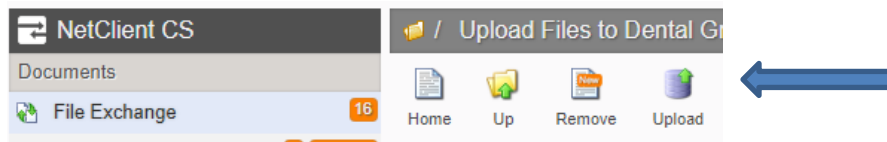
You can upload files of up to 2 gigabytes (GB) to the “Upload Files to Dental Group” folder. If you upload multiple files, the size of each file must be 2 GB or less. We recommend that you upload files directly to File Exchange from your computer, network, or mobile device.

1. In the Documents section of the navigation pane, click the **File Exchange** link.
2. In the File Exchange screen, click the “Upload Files to Dental Group” folder. Depending on the folder structure, you might need to navigate through sub-folders to access the desired folder.



- **Note:** If you have saved the file with the same name as the file you downloaded, you will overwrite the original file if you upload it to your portal.

3. Click the Upload icon.



4. Do one of the following.


- Click the Add files button, navigate to the files you want to upload, select them, and click the Open button. After you add all of the files that you want to upload, click the Start upload button.
  - If your internet browser supports HTML 5, the words "Drag files here" appear in the upload section. You can upload files by opening Windows Explorer, navigating to the files you want to upload, selecting the files, and dragging the files to the file list. After you add all of the files that you want to upload, click the Start upload button.
  - If the files you need to upload are in Dropbox, click Choose from Dropbox at the bottom of the upload dialog, navigate to and select the files you want to upload, and click the Choose button.
5. If you uploaded files that we have requested to a folder within the File Transfers folder, click the Complete File Transfer button. After you click this button, NetClient CS will not allow you to upload additional files to the folder, and NetClient CS will notify us that you uploaded the requested files.

## File Exchange Folder Types

You might see the following types of folders in the File Exchange screen.

**Note:** If a new file is available in a File Exchange folder, a new indicator appears to the right of both the folder name and the file name. NetClient CS will remove the indicator when you open the file.

Folder type	Description
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	In general, File Exchange serves as a temporary storage location for files that we need to pass on to you. Files will remain in temporary folders for 14 days, after which NetClient CS removes them automatically.
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Temporary
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A clock appears on the icon for temporary folders. When you open a temporary folder, the application displays in the Expiration date column the date on which each file will be automatically removed.
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Permanent
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NetClient CS does not delete files that are placed in permanent folders. A lock appears on the icon for permanent folders.
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This is a temporary folder that NetClient CS deletes automatically after 30 days. The folder contains one or both of the following types of folders.
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File Transfer
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-  Folders to which you can upload files that we requested.
-  Folders to which we uploaded files for you.

You can also access secure messages from our staff from within this folder.

## Document Presentation Folders

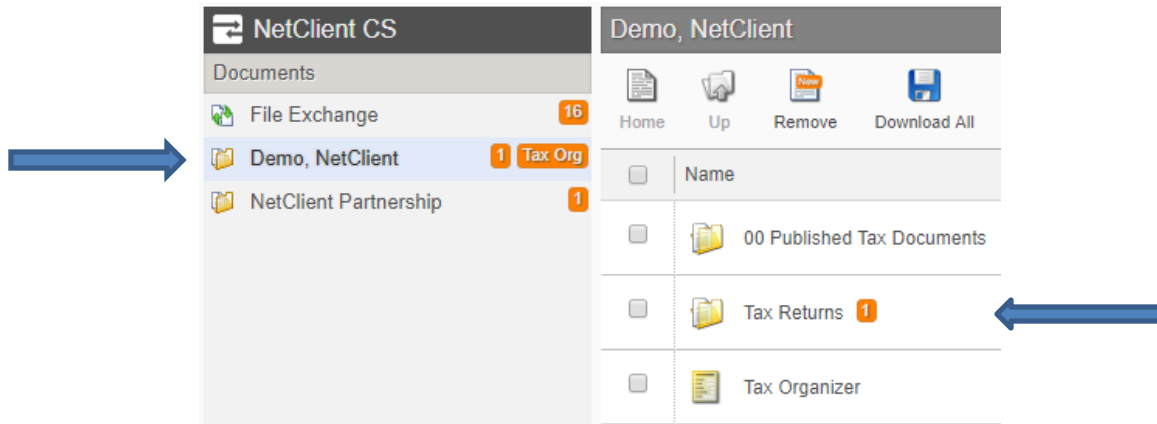
You must have Adobe Reader version 7.0 or higher installed to view PDF files. If you don't have the current version or if you have difficulty opening files, you can download and install the latest version of the Reader from the Adobe Reader page of the Adobe website.

If new files are available in the Documents section of the navigation pane, NetClient CS places an alert to the right of the link that contains the files. Depending on how we configured NetClient CS, you might receive notification messages when we upload files.

NetClient CS also places New flags to the right of each folder that leads to the file and to the right of the new file; you can follow these flags to new files.

NetClient CS places alert icons to the right of files that require attention, such as tax returns, web organizers, and related files.

- In the Documents section of the navigation pane, click the link that contains the file you want to view.
  - Links that are named for the taxpayer contain personal documents; links that are named for companies contain business documents.
- Click the folder that contains the file you want to view. Depending on the folder structure, you may need to open sub-folders to access the file.



3. Do one of the following.

- Click the name of a file to open it.
- To download multiple files from a folder, including any files that are in subfolders within the folder, click the Download All button at the top of the screen. NetClient CS creates a ZIP file that you can save to your computer or to a network location.

If you cannot see files, you might need to delete your temporary internet files or cached files.

Depending on how your computer is configured, you will either be prompted to save the file to your hard drive or the file will open automatically in the appropriate application.

Print the file, or download it by choosing File > Save As and navigating to the desired folder.

Please contact our office at 425-216-1612 if you need any help with navigating or using your portal!