

# BDO ClientFlow

User Guide



**BDO Seidman, LLP**  
Accountants and Consultants

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## Introduction

This User Guide is designed for clients who will be using BDO ClientFlow. BDO ClientFlow is a solution for clients and BDO Seidman, LLP (BDO) to exchange electronic documents securely and quickly. As an alternative to emailing documents, BDO ClientFlow uses encryption technology so the firm and its clients will have confidence knowing that the information is secure. For added security, all BDO ClientFlow activities, including document publishing and client viewing, are recorded and audited.

Clients can access documents by logging into BDO ClientFlow through a link on BDO's website (<http://www.bdo.com/bdoclientflow/>). Clients will be able to view documents BDO has published to the client, as well as upload documents to BDO through BDO ClientFlow. In order to use BDO ClientFlow, you will need to ensure your computer is setup with the System Requirement below:

**Note: Check with your Technical professional before making any changes to your computer.**

## Minimum System Requirements for BDO ClientFlow

Best Practice Recommendation: It is assumed that settings and configurations outlined below are applied on a workstation with up-to-date operating system and Internet Browser is configured to manufacturer's defaults. For more details, please refer to *System recommendations for BDO ClientFlow* section.

In order for BDO ClientFlow to perform as expected, the following minimum hardware and software requirements are recommended:

### General Workstation

- Operating System: Windows 2000, or higher
- Internet connectivity should be either DSL or Cable broadband class connection speed

### Minimum Software Requirements

- Internet Browser: Internet Explorer 6 or higher
- Microsoft component: MSXML 4 (version 4.20.9841.0 or higher)

### Minimum Hardware Requirements

- Monitor: Supports 1024x768 screen resolution
- Other peripherals: Keyboards and mouse internet

### Browser Configuration

- Trusted Sites to include [https://\\*.gofileroom.com](https://*.gofileroom.com)
- Custom Level in Trusted Sites lists 'enable' for Access data sources across domains

## Software:

Adobe Acrobat or Reader 6.0 or newer is required. Only one version should be installed (e.g., Adobe Acrobat should not be installed if Adobe Reader is already installed. If Reader is already installed, uninstall it before installing Adobe Acrobat)

Microsoft Office 2000 or higher is required if users intend to view Microsoft Office documents from BDO ClientFlow.

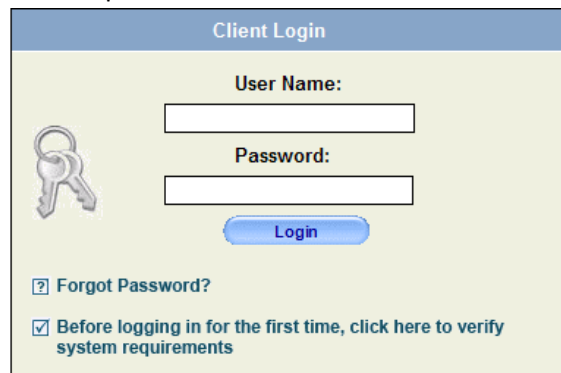
## System Recommendations for BDO ClientFlow

- Microsoft Windows 2000 Professional, Microsoft Windows XP Professional, or Windows® Vista™ (Ultimate, Business, and Enterprise Editions)
- Internet Explorer:
  - 6.0 or higher is required (Internet Explorer 7.0 is preferred).
  - 128-bit encryption minimum.

Two options are available for managing the settings to successfully use BDO's ClientFlow. One option automatically manages all of the system configurations while the other allows them to be manually updated.

### Automated System Configuration Option

- Access the BDO ClientFlow Configuration Executable File by navigating to <https://www.gofileroom.com/bdo/> and clicking on "Before logging in for the first time, click here to verify system requirements".



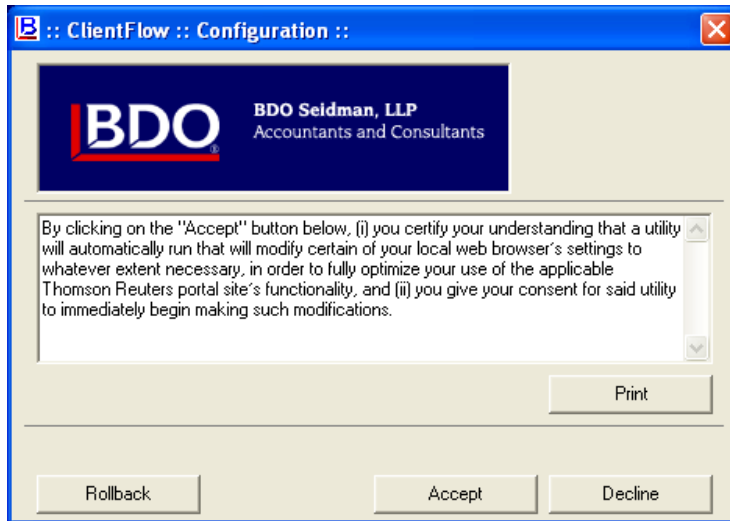
- At the next screen, select "click here" to start the installation

Please read the user guide prior to using BDO ClientFlow ( [click here](#) for user guide ).

The user guide includes instructions on how to **manually configure your computer** to be compatible with BDO ClientFlow.

To **automatically configure your computer for ClientFlow**, [click here](#).

- Save the file to your computer and double click to start the installation.
- Read the disclosure statement and select Accept to proceed or Decline to stop the installation. (Figure A)



*Figure A*

- The installer will automatically complete all of the steps notes in the Manual System Configuration. To see a list of all of the changes made to your system, click on the **Open the log file for your review** box as noted in Figure B and click Close.



*Figure B*

- The Log File will appear as indicated below in Figure C

```

gfrSettings_2008121611.txt - Notepad
File Edit Format View Help
12/16/2008 11:02:25 AM: Proceeded to the next step
12/16/2008 11:02:25 AM: Beginning of applying changes
12/16/2008 11:02:25 AM: Updating Internet Security settings (Click Start > Choose Run > type inetcp1.cp1 > hit Enter)
12/16/2008 11:02:25 AM: Applying changes to the list of Trusted Sites
12/16/2008 11:02:25 AM: Trusted Site 1 to be added : *.gofileroom.com
12/16/2008 11:02:25 AM: Applying changes to the Custom Level of Trusted Sites (Internet Security > Trusted Sites tab)
12/16/2008 11:02:25 AM: Change 1 to be made : Display Mixed Content: Enable
12/16/2008 11:02:25 AM: Change 2 to be made : Access Data Sources Across Domains: Enable
12/16/2008 11:02:25 AM: Change 3 to be made : Use Pop-up Blocker: Disable
12/16/2008 11:02:26 AM: Applying changes to Internet Explorer international Encoding settings (Internet Explorer > Page > Encod
12/16/2008 11:02:26 AM: Change 1 to be made : Use Pop-up Blocker: western European (windows)
12/16/2008 11:02:26 AM: Applying changes in Internet Security window (Internet Security > Advanced tab and General Tab )
12/16/2008 11:02:26 AM: Change 1 to be made : Do Not Save Encrypted Pages To Disk: Uncheck
12/16/2008 11:02:26 AM: Change 2 to be made : Check For Newer Versions Of Stored Pages: Automatically
12/16/2008 11:02:26 AM: Applying changes in Internet Security window (Internet Security > Advanced tab )
12/16/2008 11:02:26 AM: Change 1 to be made : Reuse windows For Launching Shortcuts (when Tabbed Browsing Is off): Unchec
12/16/2008 11:02:26 AM: Applying installation packages/modules
12/16/2008 11:17:04 AM: User attempted to close the application
12/16/2008 11:17:04 AM: User agreed to closing of the application

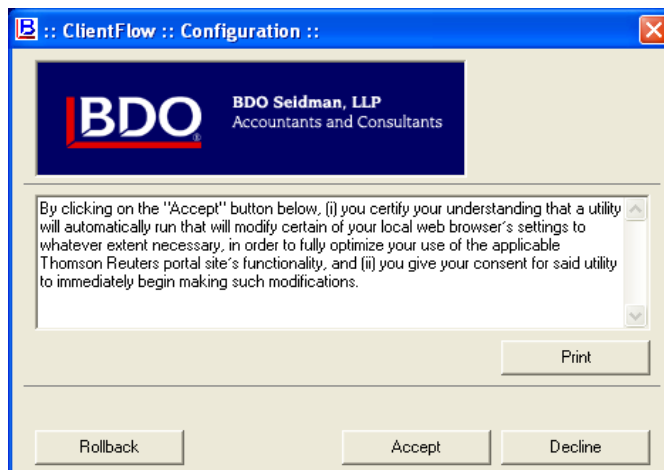
```

Figure C

*\*Note: A rollback option is available to “undo” any of the above listed settings.*

- Rollback feature

The Rollback feature is designed to roll back the settings to what they were prior to running the installation. To use the Roll feature, click on the installation file again, and select “Rollback” (see below).



## Manual System Configuration Option

- Add \*.gofileroom.com as a trusted site. (Figure 1)
  - In Internet Explorer, go to the Tools menu, select Internet Options.
  - In the Internet Options dialog window, click on the Security tab.

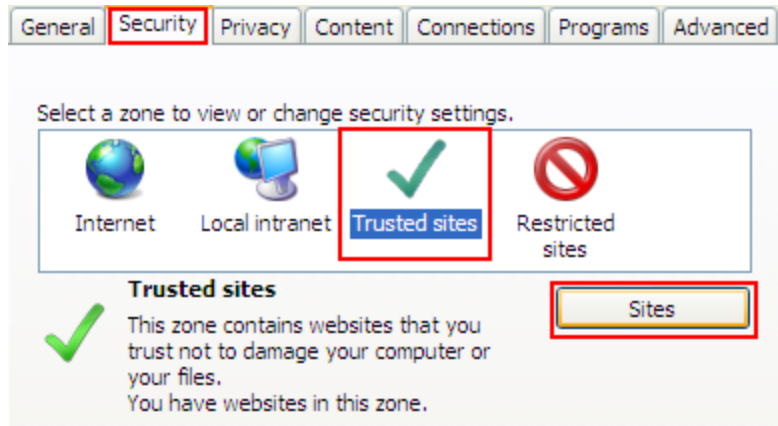


Figure 1

- Click on Trusted sites and then click on the Sites button.
- In the Add this website to the zone field, type in `https://*.gofileroom.com`
- Click the **Add** button. (Figure 2)

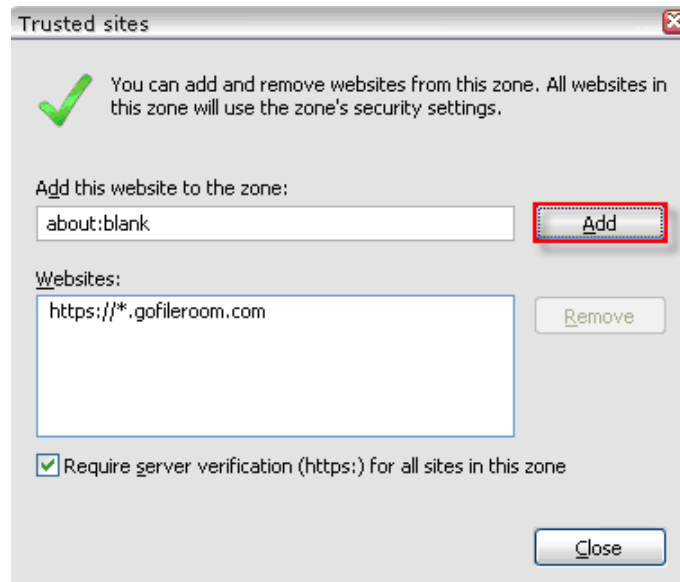


Figure 2

- Custom Level in Trusted Sites (Figure 3) select 'Enable' under Access data sources across domains

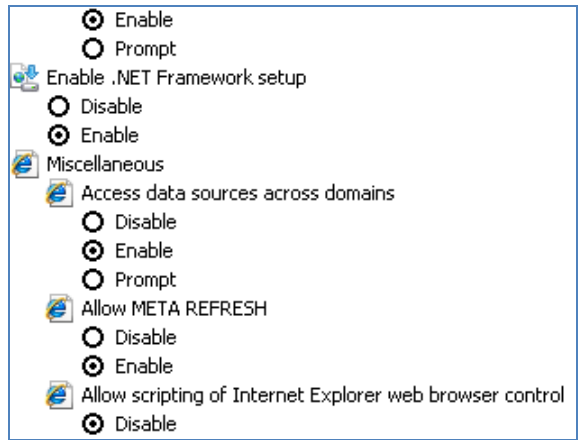


Figure 3

- Additional Setting – In some instances, it may be necessary to uncheck the “Reuse windows for launching shortcuts” setting on Internet Explorer “Advanced” tab in order to allow for successful uploading of client documents to the CF Upload drawer (Figure 4):

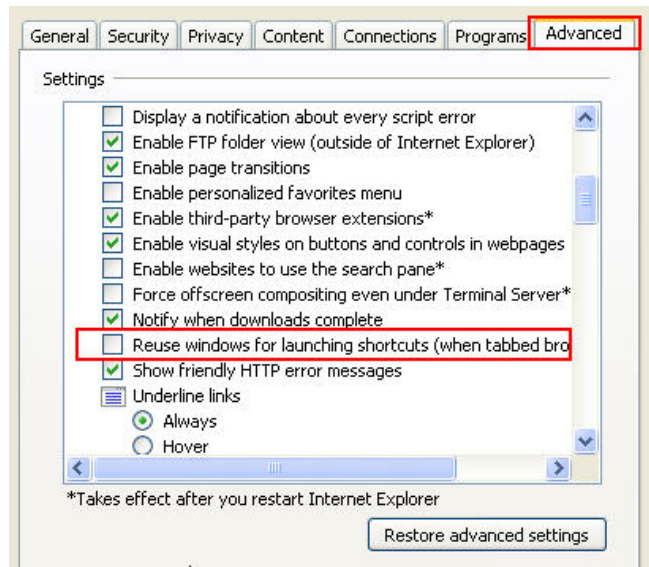


Figure 4

## Check Browser

To verify you have the appropriate software installed, go to <https://www.gofileroom.com/bdo/> and click on “Before logging in, click here to verify system requirements”

Please use this table to check your specific browser settings such as browser type, version numbers and extensions or plug-ins installed in your browser.

It is required that you use Microsoft Internet Explorer versions 6 or higher.

If any of the cells in the **ENABLED** column do not read 'Yes', please click corresponding links to address those issues.

		VERSION NUMBER:	ENABLED:
SOFTWARE INSTALLED:	Microsoft Internet Explorer	6 or higher	Yes
	Flash Player	8.0 or higher	Yes
	Cookies		Yes
	MSXML	4.0	Yes
	Acrobat	6.0 or higher	Yes

Figure 5

## Accessing and Using BDO ClientFlow

Below are step-by-step instructions on logging in to BDO ClientFlow. Prior to receiving a login to access the system, you will be asked to sign an addendum to your existing engagement letter. In this addendum you will be asked to provide a name and e-mail address. This information, along with your signature provides the needed authorization to create a BDO ClientFlow login and give you access to this system.

You are responsible for notifying BDO Seidman, LLP at [bdoclientflow@bdo.com](mailto:bdoclientflow@bdo.com) immediately, if this access should be terminated.

1. Once the addendum is signed, BDO will provide you with a login and password. This is typically delivered via two e-mails. The first e-mail will contain the login (this will be the e-mail address you provided) and the second e-mail will provide a temporary password.

Note: Depending on your email service, your login email may go to your SPAM or Junk mail folder. If you still do not see your login info in these folders, contact [bdoclientflow@bdo.com](mailto:bdoclientflow@bdo.com).

**Sample Login Email:**

From	Subject	Date	Size
BDOClientFlow@bdo.com	Access Your Documents On-Line (Part 1)	Mon, 9/29/08 8:56 AM	3KB
BDOClientFlow@bdo.com	Access Your Documents On-Line (Part 2)	Mon, 9/29/08 8:56 AM	3KB

Dear Client

You may now access your documents on-line by clicking the link below and logging into our web-based document management system:

<https://www.gofileroom.com/bdo/>

Your Login is: client@client.com

For Security Reasons, we are sending you your password in a separate email. If you experience any difficulties accessing documents, please call your Client Service Tax Professional or email us at: BDOClientFlow@bdo.com

**Sample Password Email:**

Dear Client:

For Security Reasons, we are sending the password to access your documents separately from your Login.

For complete login instructions, please refer to the previous email - "Access Your Documents On-Line (Part 1)".

Your password is: password (you will be asked to change your password once you login)

If you experience any difficulties accessing documents, please call your Client Service Tax Professional or email us at: BDOClientFlow@bdo.com

Best Regards,  
BDO Seidman, LLP

Figure 6

2. Once you have received both e-mails, click on the link in your email to get to BDO ClientFlow <https://www.gofileroom.com/bdo/>

3. Type in the User Name (your e-mail address) and temporary password provided by BDO and click Login (See Figure 8).

*Figure 8*

4. The first time you log in, you will be required to change your password (see Figure 9). When you create a new password, keep the following information in mind:
  - a. Passwords must be at least 8 characters in length.
  - b. Passwords must include both a letter and a number (symbols may also be used).
  - c. Passwords are case sensitive.
  - d. Login sessions will expire after three hours of no activity.
  - e. Users will be required to change their passwords on a regular basis for security purposes (e.g. every 90 days). Passwords cannot be reused for 9 cycles. User accounts are inactivated after three (3) login attempts with an invalid password.

*Figure 9*

5. In the Old Password field, enter the temporary password provided in your password e-mail.
6. In the New Password field, enter a new password using the above-mentioned guidelines.
7. In the Verify Password field, re-enter the new password.
8. Click on the Save button. (see Figure 9)

**Important Note:** *If you have forgotten your password or if you receive a message indicating that your account has been disabled, you can reset your own password by clicking on the [? Forgot Password?](#) link on the login screen. This will have a temporary password sent to your e-mail address and if necessary, will re-enable your account.*

9. The BDO ClientFlow page will be displayed listing the documents that have been made available for you to view.

The screenshot displays the BDO ClientFlow interface. At the top left is the BDO logo and the text "BDO Seldman, LLP Accountants and Consultants". A navigation bar contains buttons for "Go Back", "Add Documents", "History", "Change Password", and "Logout". Below this, the client information is shown: "Client Name: GARCIA, CAROLYN" and "Client Number: 0107323". A table below lists documents with columns for Year, Document Type, Description, and Document Date.

Year	Document Type	Description	Document Date
2000	ATTACHMENTS	SCANNING	01/13/2009
2008	CORRESPONDENCE	TATUM K-1	12/10/2008
	CORRESPONDENCE	COMPOSITE STATE SURVEY	01/13/2009
	ENGAGEMENT LETTER	TO BE SIGNED	12/10/2008
	TAX RETURN	FORM 1040 - INDIVIDUAL TAX RETURN	12/10/2008
	WORKPAPERS/SOURCE D...	BLANK ORGANIZER	12/10/2008

Figure 10

## Using BDO ClientFlow

Once you have successfully logged in to BDO ClientFlow, you will have access to view any documents that BDO Seidman LLP has made available to you (see Figure 10). From this main screen, you will also be able to Add Documents, see a history of documents you have added, change your password and logout.

## Viewing Documents

Documents available for viewing will be displayed including the year (if applicable), the type of document, a description of the document and the date the documents was added. To view a document, click anywhere on the row of the document you would like to view.

The document will open in the application it is associated with, such as Adobe Acrobat®, Microsoft Word®, or Microsoft Excel® (Figure 11).

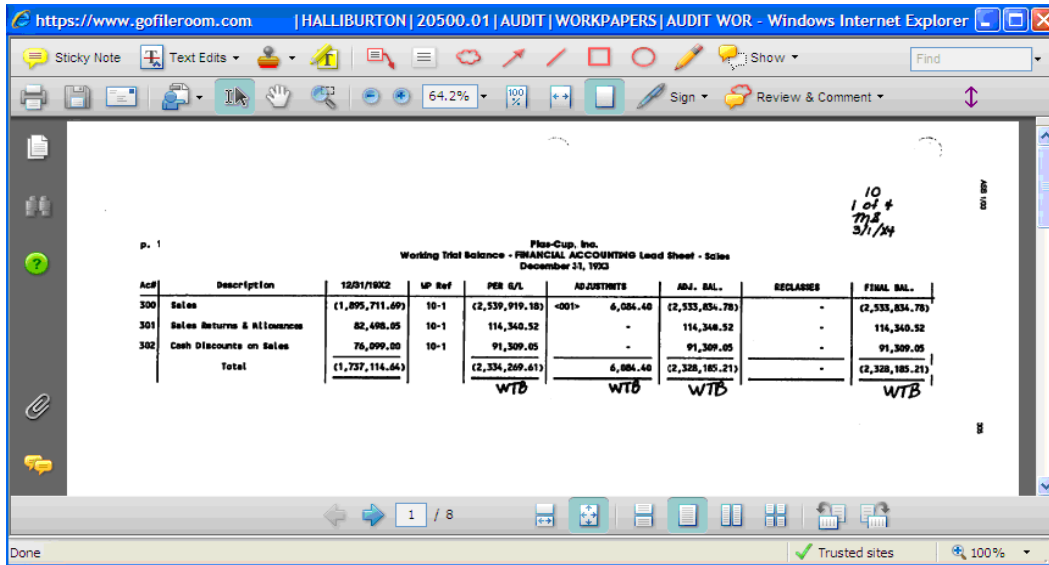


Figure 11

Documents opened from BDO ClientFlow are READ-ONLY. If you would like to make changes to the document, you must first save the document on your computer. Open the saved file and make changes. If you would like to send an edited file to BDO Seidman LLP, refer to the Adding Documents section.

**Note: You are not automatically notified when a document has been made available to you. You should check the BDO ClientFlow site periodically to see if new documents are available.**

## Adding Documents

If you would like to send a document to BDO Seidman LLP, the document should be saved on your computer. Click on the [Add Documents](#) option at the top of the screen (see Figure 10).

Client Name: HALLIBURTON

Client Number: 20500.01

Description :

File :

Figure 12

Enter a description of the document that will be uploaded to BDO Seidman LLP. (Figures 12 and 13)

Description :

Figure 13

Click on the **Browse...** button to locate and select the file to upload. (Figure 12)

In the **Choose file** dialog window, double click on the file name to select or click on the file one time and then click on the Open button in the lower right of the window. (Figure 14).

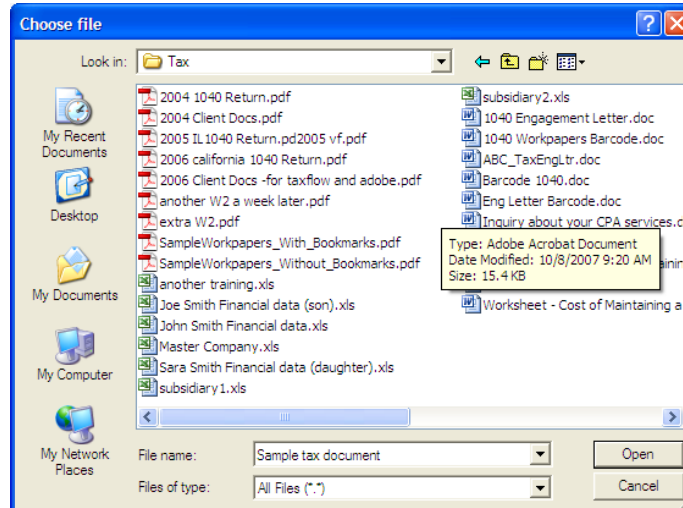


Figure 14

With the path to the select file showing, click the Save Button. (Figure 15)

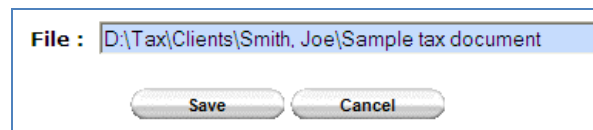


Figure 15

A graphic will appear on your screen confirming that the upload is in progress. Large documents and slow or congested internet connections will take longer to upload. (Figure 16)



Figure 16

Click on the OK confirmation window when the upload is complete (Figure 17).

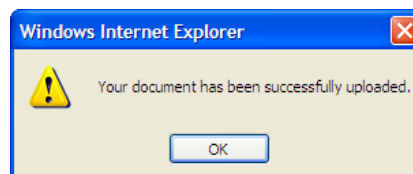


Figure 17

If you do not get the successfully uploaded message, it is likely your file did not get uploaded. Please check the system requirements and your internet connection carefully to ensure all the changes have been made correctly.

### **Important Information about Documents Uploaded into BDO ClientFlow**

- Any type of document or file can be uploaded with BDO ClientFlow and viewed in its native format except for TIFF files.
- TIFF files will be converted to PDF files when viewed by the firm.
- Approximately 400 MB is the maximum file size that can be uploaded to BDO ClientFlow.
- A BDO ClientFlow session may time-out if the Internet connection is not fast enough to completely upload the document within 3 hours.
- Individual documents can be uploaded to BDO ClientFlow one at a time. Multiple documents may be uploaded at one time if they are ZIPPED into a single file.
- BDO is NOT automatically notified when a user uploads a document to BDO ClientFlow. Please contact client service professional to let them know when documents have been uploaded.