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How to Upload a File to www.jrrocpas.com

STEP BY STEP INSTRUCTIONS FOR USING CLIENT FLOW

1st – From Left menu, click on "Client Flow"

2nd – Select the folder of the desired client

Documents
File Exchange
ClientFlow
SMITH, JOHN
SMITH CORP.

/
Home   Up

Client Name ▲

SMITH, JOHN

SMITH CORP.

3rd – From menu bar, click "Upload"

/ SMITH, JOHN

Home   Up   Upload

Client Name ▲

4th – Click "Add Files" or drag files over (Located on your computer)

5th – IMPORTANT: To finish, click "Start Upload"

Filename	Size	Status

Drag files here.

⊕ Add files   ⇧ Start upload   0 b   0%

Choose from Dropbox
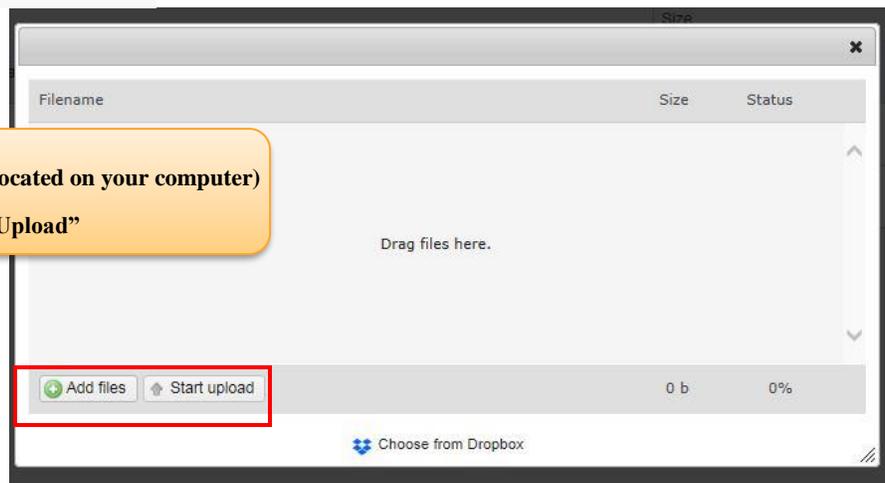
6th - Once files have finished uploading, the load bar will show 100%, and you can close the upload box. The files will then be listed on your main window.

-Please contact our office if you have any questions-