Tax Symphony® ClientSpace Quick Start Guide

Username and Password Email

A system-generated email with your Username and Password is sent the first time you are provided access to any ClientSpace.

You will be prompted to change your password the first time you log in.

Grant Thornton

New Tax Symphony® account has been created

A Grant Thornton LLP account has been created for use to access your Grant Thornton Tax Symphony® ClientSpace. Your login details are below:

Username: CHadley@Bouw.com
Password: f9Z1Uq9$

You will receive a second email shortly with a link to directly access your Tax Symphony ClientSpace. You will then be prompted to change your temporary password.

Please note that your ClientSpace is best viewed in Window Internet Explorer version 8 or newer.

This email is an automated message. Please do not reply.

Figure 1-1: Username and **Password** email

ClientSpace Email

A second email will provide a direct link to the engagement-specific ClientSpace in addition to Grant Thornton Interactive.

Grant Thornton Interactive is used to access all your active engagements.

Grant Thornton

Welcome to your Tax Symphony® ClientSpace

Welcome to the Grant Thornton Tax Symphony® ClientSpace:
Bouw Construction | 2019 TR Prep

If this is the first time you are logging in, Workgroup Collaboration will prompt you to change the temporary password you received in a separate email. If this is not your first time logging into a Grant Thornton Workgroup Collaboration site, simply use your email address as your login name and the password you have established previously. If you do not remember your password, click the **Forget Your Password?** link on the login page.

As a user on this site you will be able to:

•Coordinate calendars and schedules.
•Share information and review documents

If there are any questions, please contact your engagement team.

For more information on using your ClientSpace, access our training documentation.

For your convenience, all of your Collaboration spaces can be accessed through Grant Thornton Interactive.

Please note that your ClientSpace is best viewed in Windows Internet Explorer version 8 or newer.

This email is an automated message. Please do not reply

Figure 1-2: ClientSpace and **Grant Thornton Interactive** access email.

Accessing Tax Symphony® ClientSpace Quick Start Guide

Grant Thornton Interactive

Access all your active engagements from **Grant Thornton Interactive**

Three ways to access Grant Thornton Interactive:

1. Login link on www.GrantThornton.com and then select Grant Thornton Interactive.
2. Link in Welcome to Tax Symphony ClientSpace email (goes to Sign-in screen).
3. Type www.GrantThornton.com/Interactive into web browser (displays screen to right.).

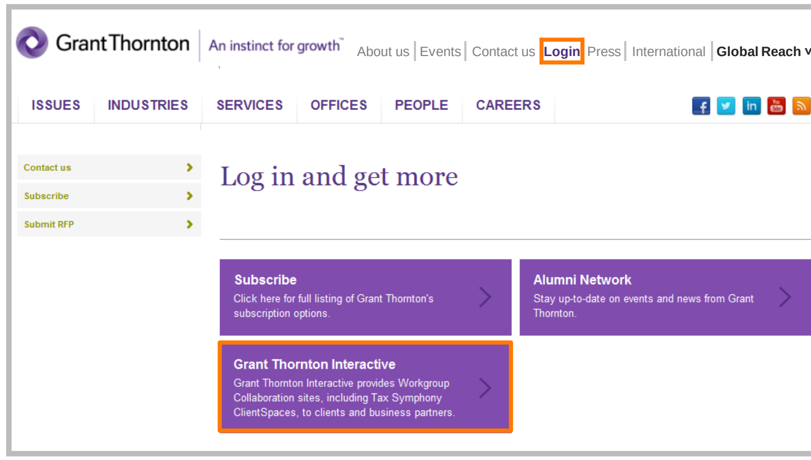


Figure 1-3: **Grant Thornton Login** homepage.

Grant Thornton Login screen

Your **User Name** will always be the email address your provided to your Grant Thornton engagement team

You will be prompted to change your password the first time you log in. The new password will be the same for future ClientSpaces.

Tip

- For your security, your new password must be **8 characters** including:

1 uppercase letter	+	1 lowercase letter	+	1 number or symbol

- Passwords cannot be reused within 12 months
- User is locked out of site after five incorrect login attempts or 180 days of inactivity
- Contact a Grant Thornton engagement team member for assistance with site access

Tip

Click ☑ **Sign me in automatically** if logging on from a private computer and to use Explorer View on the document library ribbon.

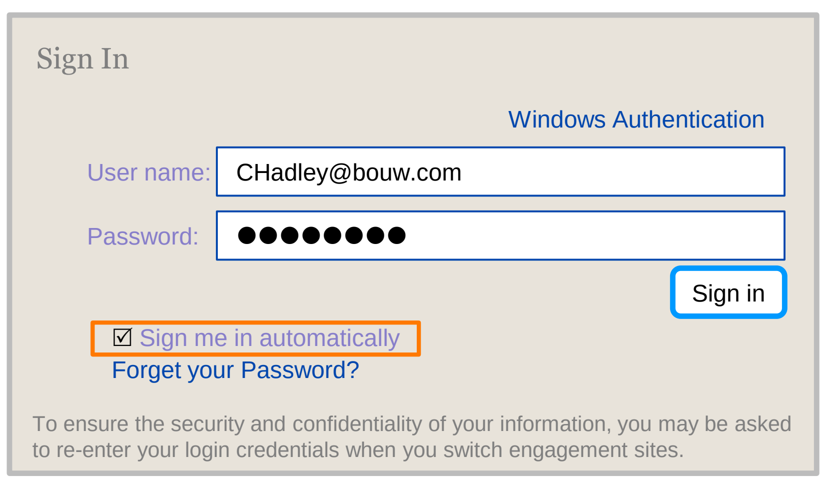
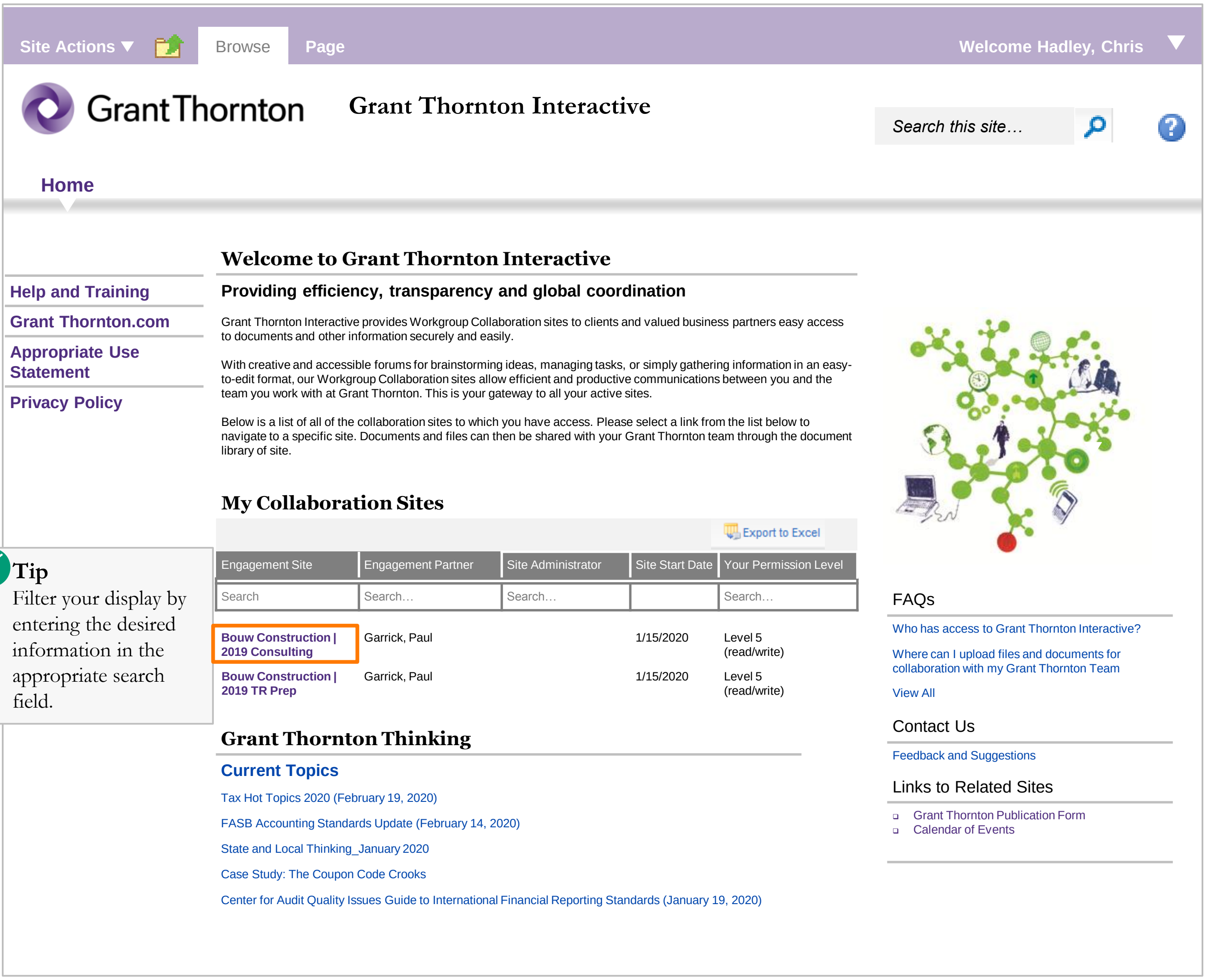


Figure 1-4: Grant Thornton **Login** screen.

Tax Symphony® ClientSpace Quick Start Guide

Grant Thornton Interactive is your homepage to access all your active engagements.



Tip
Filter your display by entering the desired information in the appropriate search field.

My Collaboration Sites - List of all ClientSpaces that you have permission to access.

Click the **Engagement Name** to go to the engagement-specific ClientSpace site.

Tax Symphony® ClientSpace Quick Start Guide

Grant Thornton

Bouw Construction | 2019 TR Prep

A

- Document Library
- Calendar
- Contact Lists
- Client Hub
- Appropriate Use Statement
- Privacy Policy
- Recycle Bin

B Announcements

Title	Expiration Date
Welcome to Tax Symphony	12/31/2020

C Client Deliverables and Milestones

Process	Phase	Task	Due Date	Complete Date	Team Member
Engagement Management	Ascertain Client Expectations	Share proposed engagement Action Plan with client	1/12/2020	1/11/2020	Ryan Donaldson
Engagement Management	Sign-off & delivery	Deliver engagement materials package to client	1/22/2020	1/18/2020	Rebecca Randal
Engagement Management	Complete administrative functions	Obtain executed Engagement Letter	1/26/2020	1/22/2020	Rebecca Randal
Engagement Management	Perform wrap-up	Conduct engagement planning wrap-up meeting	1/29/2020	1/29/2020	Ryan Donaldson
Tax Return Preparation	Initiate tax preparation process	Coordinate team "kick-off" meeting	1/27/2020	1/27/2020	Casey Walton
Tax Return Preparation	Deliver to client	Transmit requests to client	2/3/2020	2/1/2020	Casey Walton
Tax Return Preparation	Evaluate client data	Receive client data and review for completeness	2/10/2020	2/11/2020	Casey Walton
Tax Return Preparation	Evaluate client data	Identify and send outstanding PBC request	2/15/2020	2/16/2020	Casey Walton

Site Users

- Chang, Lisa
- Donaldson, Ryan
- Randall, Rebecca
- Walton, Casey

D Document Library

ClientSpace > Document Library

Type	Name	Modified	Modified By
	1 Deliverables	1/1/2020	System Account
	2 Engagement Administration	1/28/2020	System Account
	3 PBC Request	2/16/2020	System Account

Add document

E Engagement Matters

Title	Assigned To
PBC Request !New	Walton, Casey
Reportable Transactions	Chang, Lisa

Add document

F Grant Thornton Voice

Tax Publications

Tax Hot Topics 2020-1-03 (February 5, 2020)
In this issue of Tax Hot Topics, IRS releases guidance on rollovers from qualified retirement plans to Roth IRAs, IRS releases guidance on retirement plans as part of new savings initiative, IRS regs address when a single-member LLC can be treated as disregarded and more.
More...

State and Local Thinking_January 2020
In this issue... SALT Alerts from Illinois, Connecticut, New Hampshire, Wisconsin, New York, Delaware, North Carolina, Texas, Maryland and the District of Columbia... Meet Andy Richmond, senior manager for credits and incentives.
More...

G Contact Lists

Last Name	First Name	Business Phone	Email Address
Hadley	Chris	212-987-3961	CHadley@Bouw.com
Martinez	Elena	212-987-3979	Emartinez@Bouw.com
Randall	Rebecca	212-402-8527	Rebecca.Randall@us.gt.com
Walton	Casey	212-402-8754	Casey.Walton@us.gt.com

Add new Item

H Calendar

February, 2020

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31	1

A Left Hand Navigation: Navigate between items in the site, including the Client Hub.

B Announcements: See system-wide messages about maintenance tasks or other updates that may temporarily impact your use of Tax Symphony.

C Client Deliverables and Milestones: Track the status of key steps of your engagement, including due date, complete date and team member assigned to each task.

D Document Library: Access to the supporting documents for your engagement.

E Engagement Matters: Forum for messages specifically related to your engagement.

F Grant Thornton Voice: Automatically updated with Grant Thornton's latest tax publications.

G Contact List: List of contacts associated with your engagement.

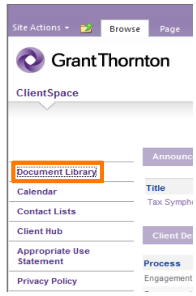
H Calendar: A calendar of upcoming meetings, deadlines or other events.

Grant Thornton

Tax Symphony® ClientSpace Quick Start Guide

Accessing Document Library

The Document Library can be accessed from Left Hand Navigation on ClientSpace.

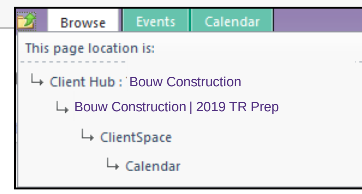


Tip
Opening the Document Library from the Left Hand Navigation may improve performance.

Open the Document Library or any other link in a new window or tab to quickly move back and forth

- **Open in New Tab** - Ctrl + hyperlink **or** Right click and select Open in New Tab
- **Open in New Window** - Shift + hyperlink **or** Right click and select Open in New Window

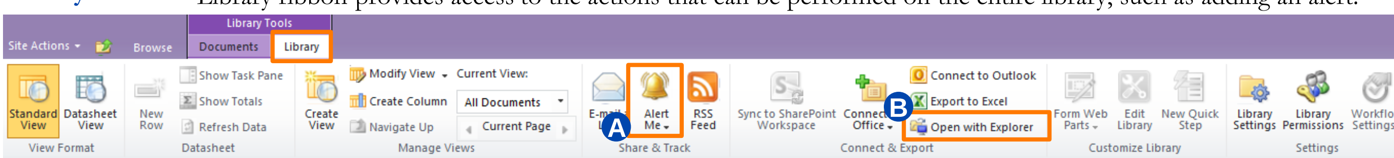
Navigate Up allows you to move quickly between visited locations.



Library Tools

Library ribbon

Library ribbon provides access to the actions that can be performed on the entire library, such as adding an alert.



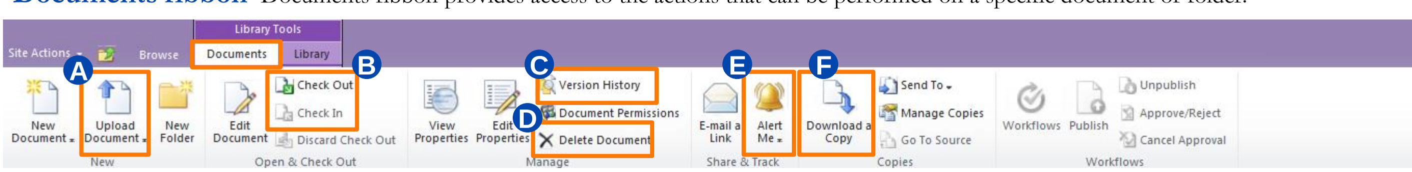
A **Alert Me:** Receive an email or mobile notification when items are added or modified in the library.

B **Open with Explorer**: Open this library as a standard Windows Explorer folder to drag and drop files, create folders, move and copy files, and delete multiple files at once. In order to use Open with Explorer, you must have sign me in automatically checked on the login screen (see page 2 of this Quick Start Card).

! Avoid using Explorer View and My Network Places, except for the one-time/first-time upload of files and documents into the ClientSpace Document Library.

Documents ribbon

Documents ribbon provides access to the actions that can be performed on a specific document or folder.



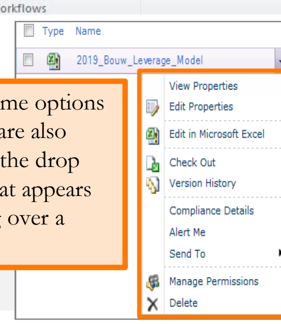
A **Upload Document:** Add one or more documents to a library and/or folder.

B **Check Out/Check In:** Use the Check Out/Check In functionality so that only one person can make changes to a document at a time.

C **Version History:** Review the version history and restore previous versions.

D **Delete Document:** Delete document is now available on sites created after 11/16/13 for clients who have been granted read/write/access.

Many of the same options on the ribbon are also available from the drop down menu that appears when hovering over a folder or file.



E **Alert Me:** Receive an email or mobile notification when a specific document or folder is modified.

F **Download a Copy:** Download a copy of a file to your computer which is not synchronized to the server copy.

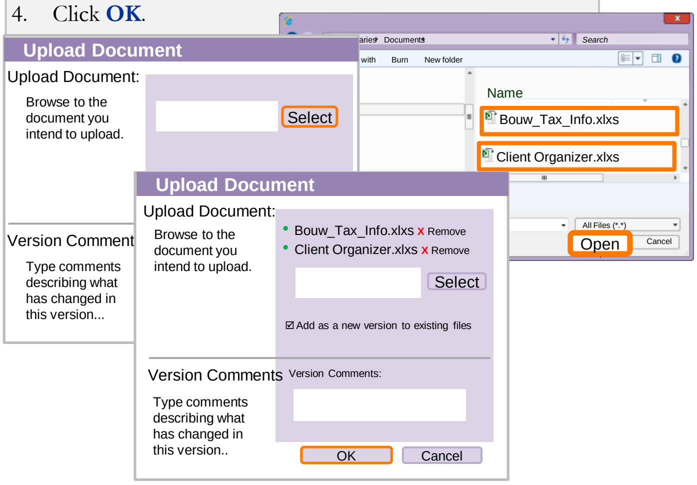
Grant Thornton

Tax Symphony® ClientSpace Quick Start Guide

Document Library

Upload Document/Upload Multiple Documents

1. Select **Upload document** or **Upload Multiple Documents** from the Document ribbon.
2. Click **Select** to browse for the document(s).
3. Select document(s) and click **Open.**
4. Click **OK**.

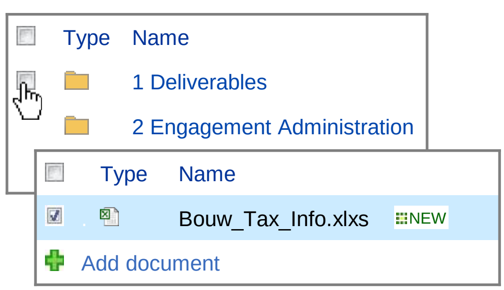


Tip

- To select multiple documents, hold down the **Ctrl** key as you click on each document name.
- To select contiguous documents, hold down the **Shift** key as you click on the document names.
- File size is limited to **250 MB.**
- File size, internet connection and network traffic will impact the wait times for loading files and are beyond the control of Grant Thornton.

Selecting folder(s) and file(s)

1. Hover over the folder or file.
2. Click the **check box** that appears to the left of the item.



Alert Me

Alerts can be added for a Library, folder or file.

- **Library** - Click **Alert Me** option in the Library ribbon.
- **Folder** – Select folder and click **Alert Me** on the Library ribbon or hover over the folder name and select **Alert Me** from the menu drop down box.
- **File** – Select the file and click on the **Alert Me** in the Documents ribbon or hover over the file name and select **Alert Me** in the drop down menu.

Alert Me dialog box

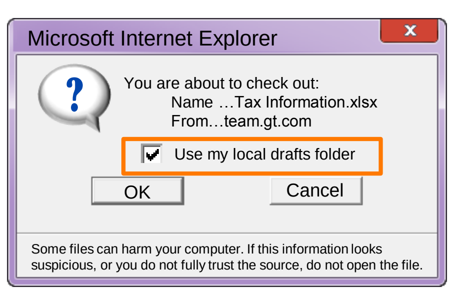
1. Name the Alert and enter/verify **email** address.
2. Select the parameters for the alert including types of changes and frequency of notification.
3. Click **OK.**

Check Out/In documents

Check Out

To check out a document,

1. Select the document and click **Check Out** from the Document ribbon.
2. Check **Use my local drafts folder**.
3. Click **OK**.
4. Open the document, make the changes and save.



Check In

Typically, you will be prompted to check in documents when closing an updated document that was checked out. Otherwise:

1. Select the document and click **Check In** from the Document ribbon.
2. Add applicable **comments** in the Check in window.
3. Click **OK**.
4. Click **Yes** to continue with the check in.

Local drafts folder is located in your **Documents** and called **SharePoint Drafts.**

Grant Thornton

Tax Symphony® ClientSpace Quick Start Guide

Recycle Bin

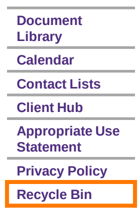
Restore deleted documents

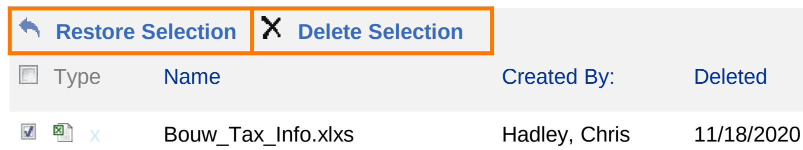
To restore a file:
1. Click **Recycle Bin** from left navigation menu
2. Select the file to restore
3. Click **Restore Selection**

To permanently purge file prior to the 30 day period elapses:
1. Select file(s)
2. Click **Delete Selection**

Tax Symphony sites created after 11/16/2013

Clients with read/write/delete rights can restore deleted files from the Recycling bin within 30 days of deletion. All files in the Recycle Bin are programmatically purged after 30 days.

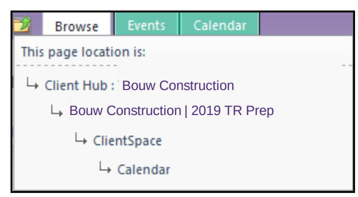




List Tools

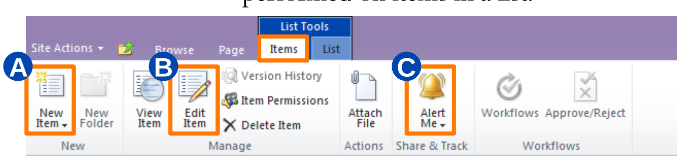
The Engagement Matters and Contacts web parts utilize the List functionality.

Navigate Up allows you to move quickly between visited locations.



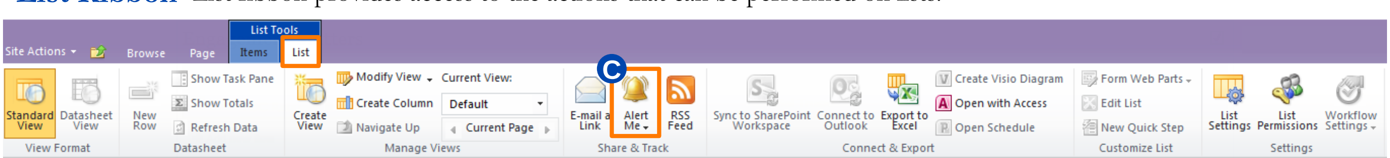
Items Ribbon

Items ribbon provides access to the actions that can be performed on items in a list.



List Ribbon

List ribbon provides access to the actions that can be performed on lists.



A **New Item:** Add a new item to the list.

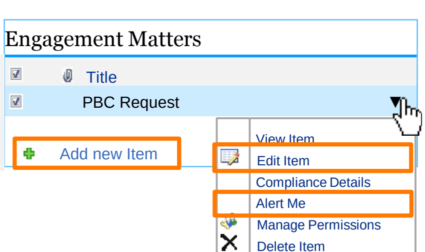
B **Edit Item:** Edit the selected item.

C **Alert Me:** Receive an email or mobile notification when items are added or modified in Engagement Matters and Contact Lists.

Engagement Matters

Forum for messages specifically related to your engagement.

- Add new items using the **Add new item** link.



An alternate approach to editing the item or adding alerts is to:
- Hover over the item name to display the **Open Menu** drop down.
- Click the **Open Menu** drop down.
- Select the **Edit Item** or **Alert Me** link.

Tax Symphony® ClientSpace Quick Start Guide

Contacts

- Click **Contact Lists** to open the contacts web part and use the List ribbon.

Contact Lists

Last Name	First Name	Business Phone	Email Address
Hadley	Chris	212-987-3961	CHadley@Bouw.com
Martinez	Elena	212-987-3979	Emartinez@Bouw.com
Randall	Rebecca	212-402-8527	Rebecca.Randall@us.gt.com
Walton	Casey	212-402-8754	Casey.Walton@us.gt.com

Add new Item

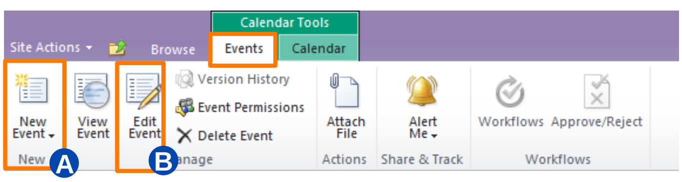
An alternate approach to using the ribbon to add or edit contacts is to:
- Click the **Last Name** and then select **Edit Item**
- Click **Add New Item** link to add contact.

Calendar

Calendar Tools

Events Ribbon

Events ribbon provides access to the actions that can be performed on events on the calendar.



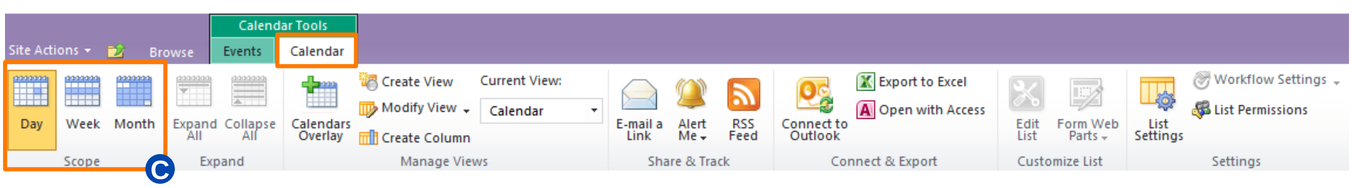
A **New Event:** Add a new item to the list.

B **Edit Event:** Edit the selected item.

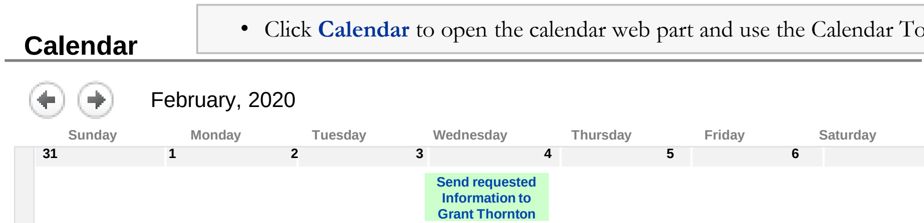
C **Scope:** View calendar by day, week or month.

Calendar Ribbon

Calendar ribbon provides access to the actions that can be performed on the calendar.



- Click **Calendar** to open the calendar web part and use the Calendar Tools.



- Navigate dates using the calendar available in the left navigation.

An alternate approach to using the ribbon to add or edit events is to:

Add an Event
- Hover in the desired date cell to display the **Add** link.
- Click the **Add** link.
- Enter the appointment information.
- Click **Save**.

Edit Event
- Hover over appointment.
- Click event title hyperlink.

Tax Symphony® ClientSpace Quick Start Guide

Tax Professional Standards Statement

This document supports Grant Thornton LLP's marketing of professional services, and is not written tax advice directed at the particular facts and circumstances of any person. If you are interested in the subject of this document we encourage you to contact us or an independent tax advisor to discuss the potential application to your particular situation. Nothing herein shall be construed as imposing a limitation on any person from disclosing the tax treatment or tax structure of any matter addressed herein. To the extent this document may be considered to contain written tax advice, any written advice contained in, forwarded with, or attached to this document is not intended by Grant Thornton to be used, and cannot be used, by any person for the purpose of avoiding penalties that may be imposed under the Internal Revenue Code.