How to use your Client Web Access

Your bank statements, credit card statements, insurance, even your kids' school lunch accounts can all be accessed via the internet, so why not your tax and accounting information?

Whether you are one to misplace papers, want information available on the go, or simply wish to go green, our Online Client Access is for you.

To Begin you will receive an email from cfd Accounting to the email address you provided to us.

1. To register your account, click on the blue "Register." If prompted enter the last 4 digits of your social security number or EIN.

2. Create a login and password. Password must contain at least 7 characters with at least one number and one letter. The password may not contain any part of your login. Your first or last name may not be contained within the password.   For example: Login: cfddemo   Password: Password1 (This is NOT a secure password. For security purposes please use something more complex).

3. Click "Register."

4. You will be immediately redirected to the login screen. Login using the information you just setup.

5. This is what you will see:

6. News from us will be available on the right had side. If you wish to see any files we have put out for you such as prior year tax returns. Click the folder on the left for that entity. If you have both a Business and you are an individual client you will see a directory with your name and a directory for the business entity's name.

7. Often times we will have standard forms for all clients (Tax Engagement Letter, Data Sheets, Farm Schedules, etc). We will push these out to everyone. To access these documents click on "File Exchange" and then "To Everyone From CFD Accounting."
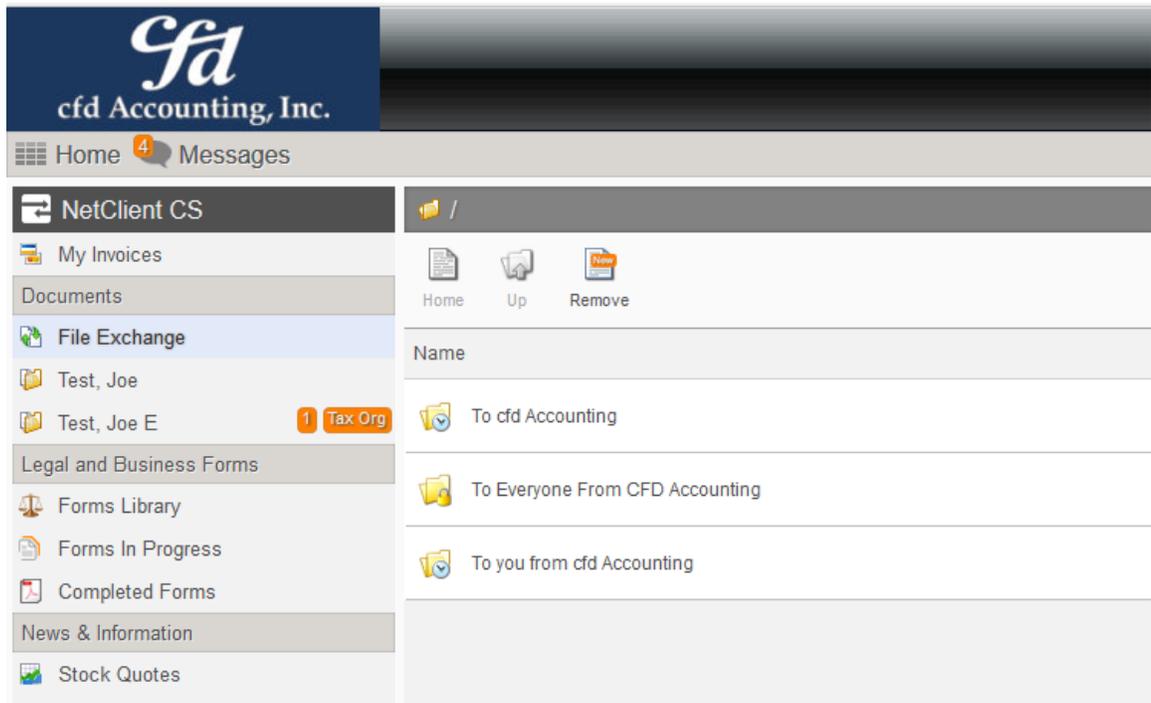
Upload documents to website

For those of you who prefer to send their documents to us electronically, but prefer to have more security than email you can upload your documents to us.

To upload documents to us we recommend creating a directory call cfd Accounting on your desktop of your computer. Most file types can be uploaded, Word, Excel, PDFs, QuickBooks Portal Files, .JPG, .TIF, etc.

**If sending files as PDFs, please be sure all pages are turned correctly and are in the correct order.

To upload files go to "File Exchange." There are a several areas to choose from.

Private – This is your area, you can upload any documents you want, but we will not be notified that you have files in this directory. **please note, we do have access to your Private directory, but we won't be notified to look there.
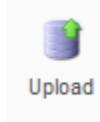
To cfd Accounting – This is where you will upload documents that you are sending to us.

To Everyone From CFD Accounting – This is where those general forms and files will be.

To you from cfd accounting – When we send you files they will sometimes be in this area.

To send a file to cfd Accounting

1. Click "File Exchange." Then click "To cfd Accounting." Click "Upload" button.

    Upload

2. A box will open up. Files can be added in a few ways.

    a. Drag and drop
        Select a file from you computer and drag it in. If you have multiple files you can drag them in individually or if you used a new directory you can open it up, and hit CTRL-A to select all and then drag and drop all of the files into this box.

        If you are sending multiple files, you can drag them in one at a time if you like. Once all of your files are in the box you can then click on the "Start upload" button.

    b. Add files button
        i. Click the "Add files" button in the bottom left. Then brows out to where you saved your files. To select multiple files to upload you can try using CTRL-A (if all the files in that directory will be uploaded only), or you can hold down the Control key while clicking on the various files with your mouse.
        ii. Once files are selected click "Open."
        iii. Scroll through to make sure only the files you want are being uploaded.
        iv. If you accidently selected the wrong file you can remove it by

            clicking on the red circle with the white minus in it.

3. Once all the files have been added click "Start upload" button.

4. After upload, the files will appear in your screen.
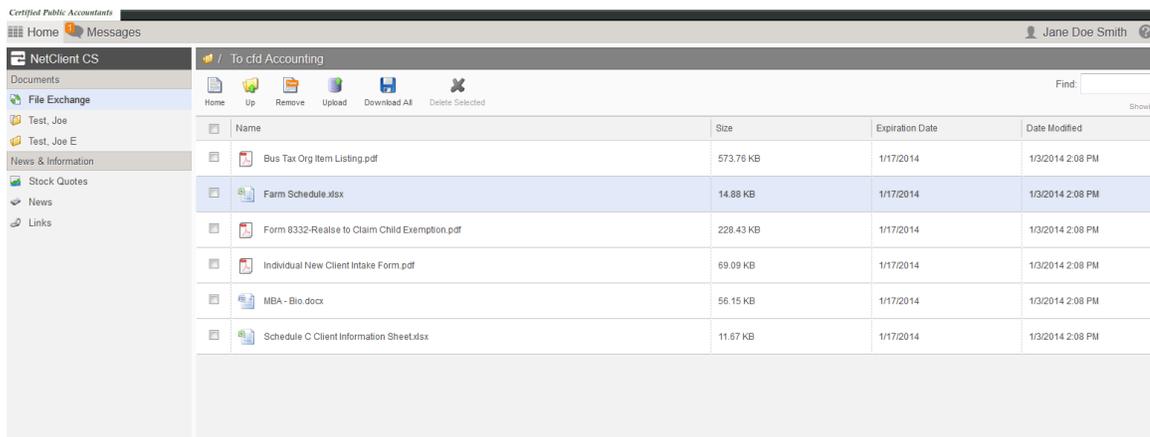
5. The files are now uploaded and you may log out.

6. To logout select your name then choose "Log Out" from the drop down.

7. If you need help with a particular area. Click that area then select "Help" from the top right corner.