

Uploading Files to Portal using ClientAccess

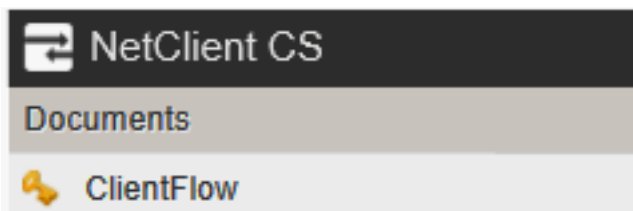
You will receive an email with instructions and a link to setup your ClientAccess login. Click on the link and follow the instructions to setup your login and password. This step is a one time setup. If you've already created your login, skip this step.

- 1) **Login to ClientAccess:** Go to the Concannon website at www.concannonmiller.com and click on "Client Log-in" then "Secure ClientAccess"
- 2) Enter your email address and password.

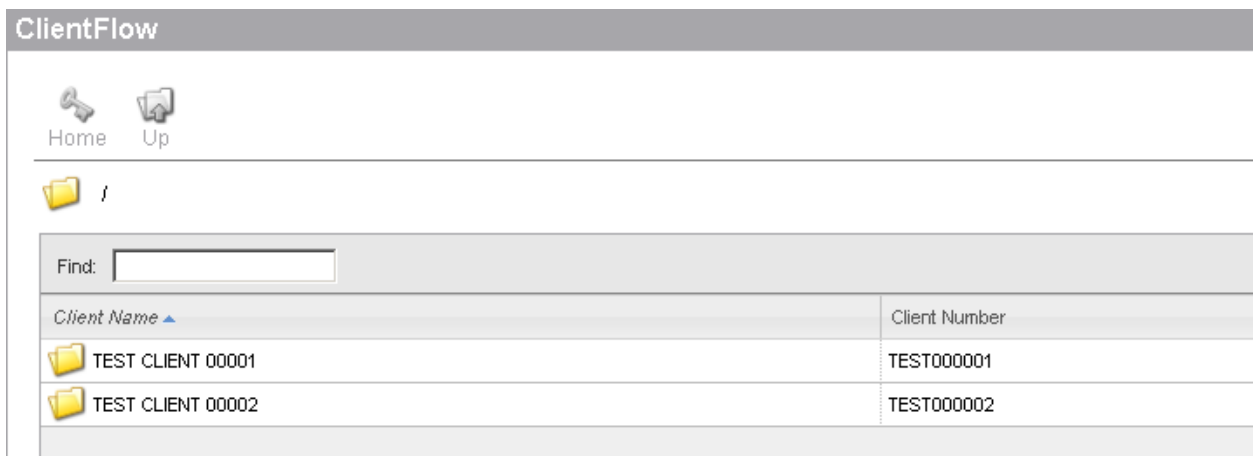
Note: For monthly clients it is recommended that you upload your QuickBooks back-up file by itself and all other month-end files should be zipped into one file for uploading. If you need help zipping files please see the instructions "How To Zip Your Files". Typically you will be uploading 2 files. In the event you are waiting on something that was not available at the time of upload it is perfectly fine to upload that document by itself.

Uploading Files

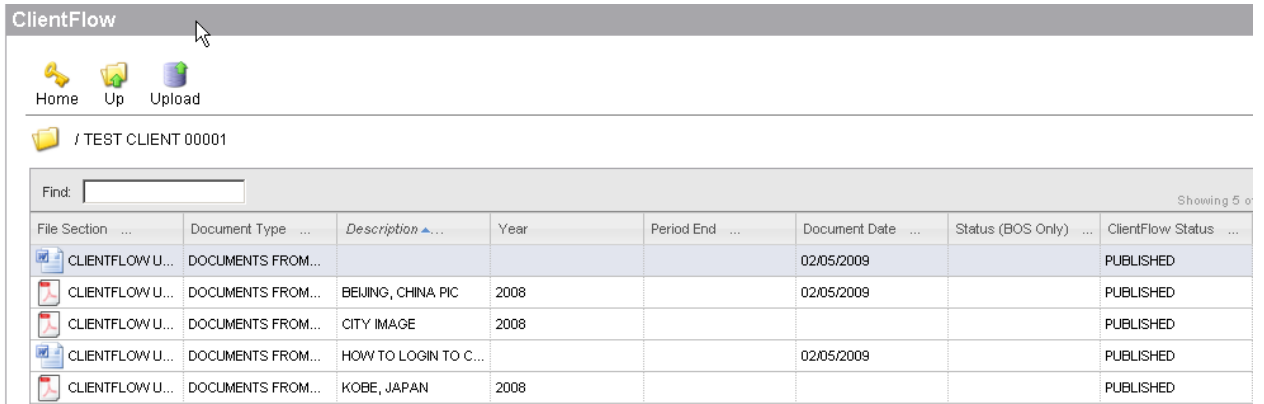
- 1) Once you are logged in you will be in the Home Section of the Dashboard. Click on the "ClientFlow" icon on the left of the screen:



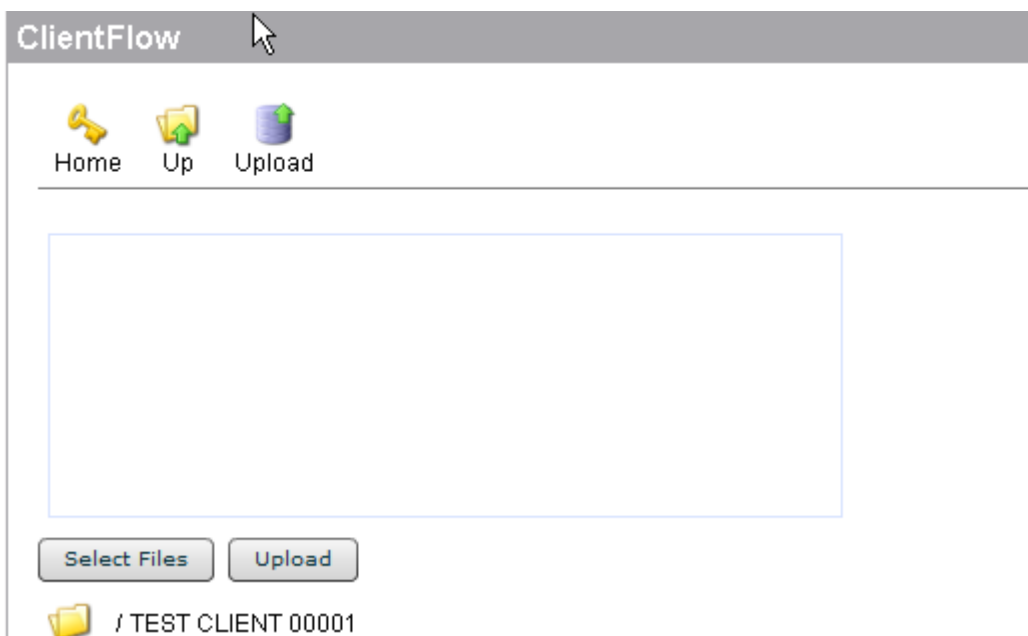
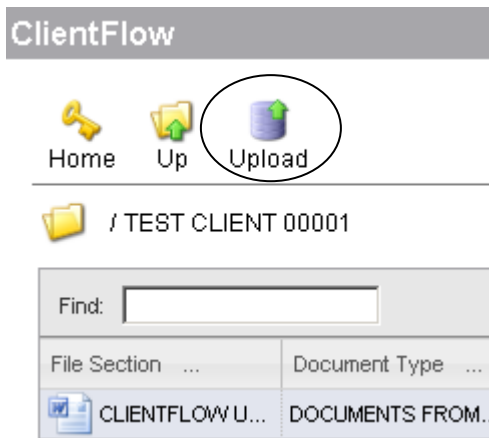
- 2) Once you are in Client Flow, you will see a folder or folders if you have multiple companies.



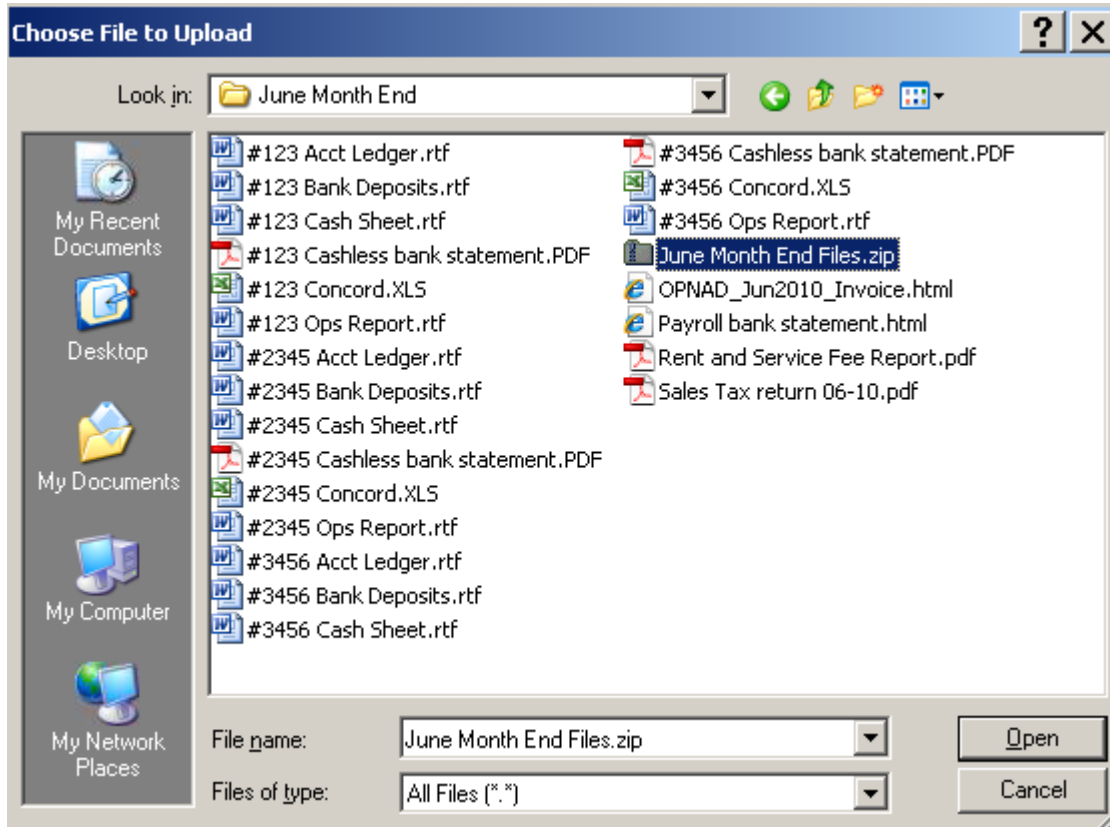
- 3) Click on the folder of the company that you want to upload to. It will open to display files in the folder.



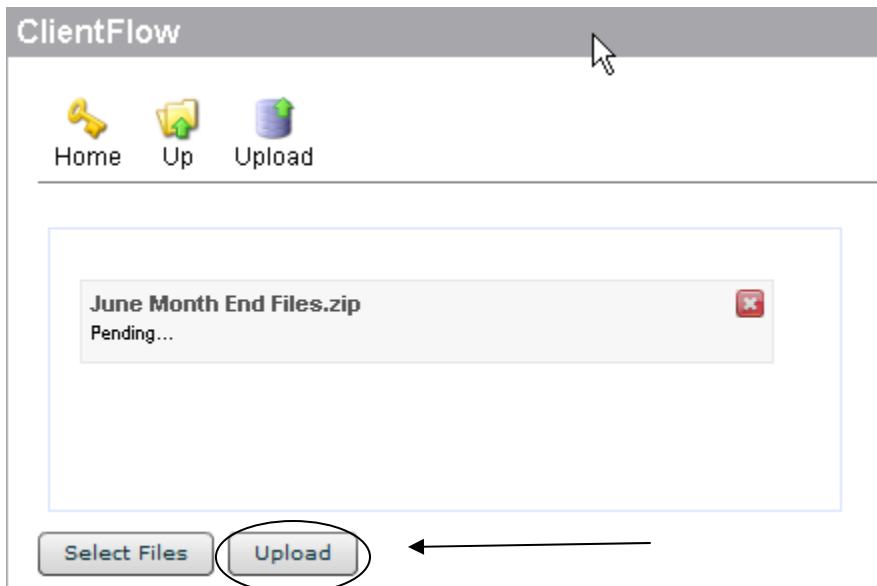
- 4) Click on the "Upload" icon just above the folder to open the "Browse" button.



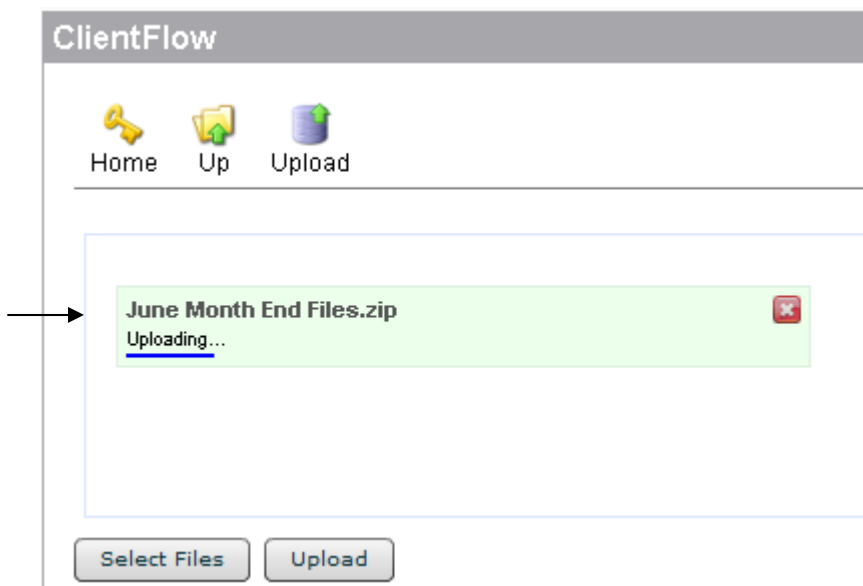
- 6) Click on the “Select Files” button and browse to the file you want to upload. In this sample I’m going to upload my June Month End Files zip file. This contains all of my month end files in one file to be uploaded. Once the file is selected click on “Open”



- 7) Now you will see the file in the “File to upload” box, then type a description in the box below it and click the square “Upload” button below the description.



- 8) You will see the blue progress bar go across. It will quickly say “completed” and the blue bar will go away once completed.



- 9) Now you’re all set to go upload your QuickBooks back-up file following the same directions.

Final Note: Always remember to “Sign Out” when you are done on the portal.

