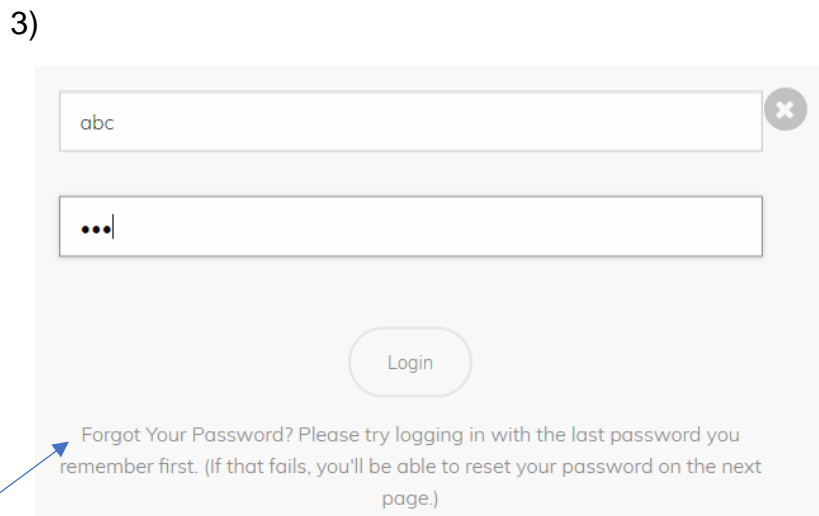
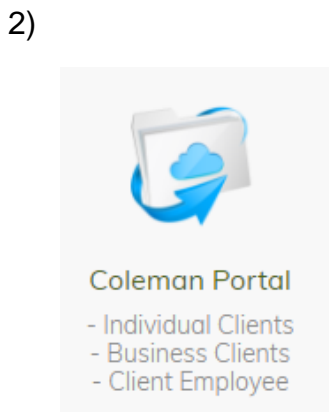
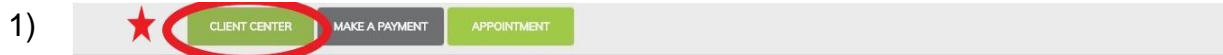


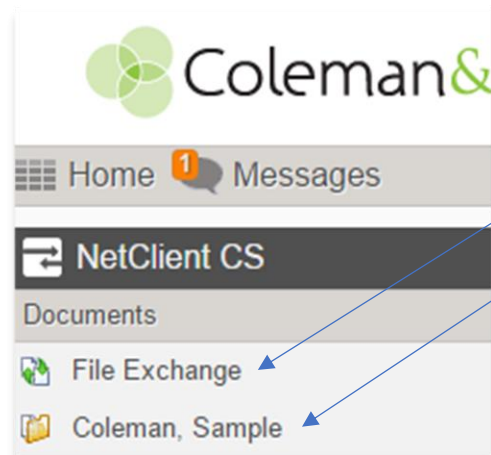
How to use your portal

Log in to your portal via the Client Center on our website www.colemancpas.com



If you do not remember your login information, guess anything and click Login to get to a page with a **Forgot password?** link.

Once you are logged in



File Exchange and your Document Folders can be found on the left side of your portal.

Use File Exchange to [send](#) and [receive](#) files securely.

Click on your folders to view copies of your tax returns and other documents.

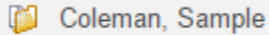


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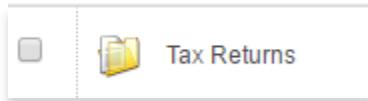
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Document folders – how to view documents

Click on the folder with your name on it (or the name of your business).



There you will find a folder called:

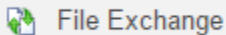


Inside you will find additional folders for each tax year which contain copies of your completed tax returns, extensions, and K-1's if applicable. Do not submit these returns. You can view, save, and print your documents.

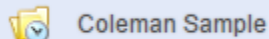
File Exchange – how to upload/download documents

How to send files via File Exchange –

Click on File Exchange on the left.



Click on the folder with your name on it.



To send files, choose the Upload button.



A new window will appear. Drag your files or choose the Add files in the bottom left corner of the window to browse to your files. After you have added all of your files, click Start upload once to send the files to Coleman.



We will receive an automatic notification of your uploaded document(s).

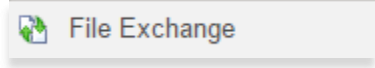


Coleman & Associates

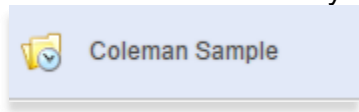
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How to view or download files from File Exchange –

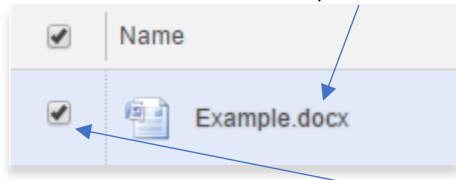
Click on File Exchange on the left.



Click on the folder with your name on it.



To view individual files, click on the document name.

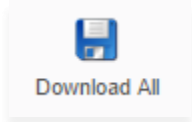


To download individual files, check the box to the left of the file(s).

Then choose Download Selected.



Alternatively, to download all of the files, simply choose Download All.



A new window will pop up asking where you would like to save the file(s).