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Introduction to the Client Portal

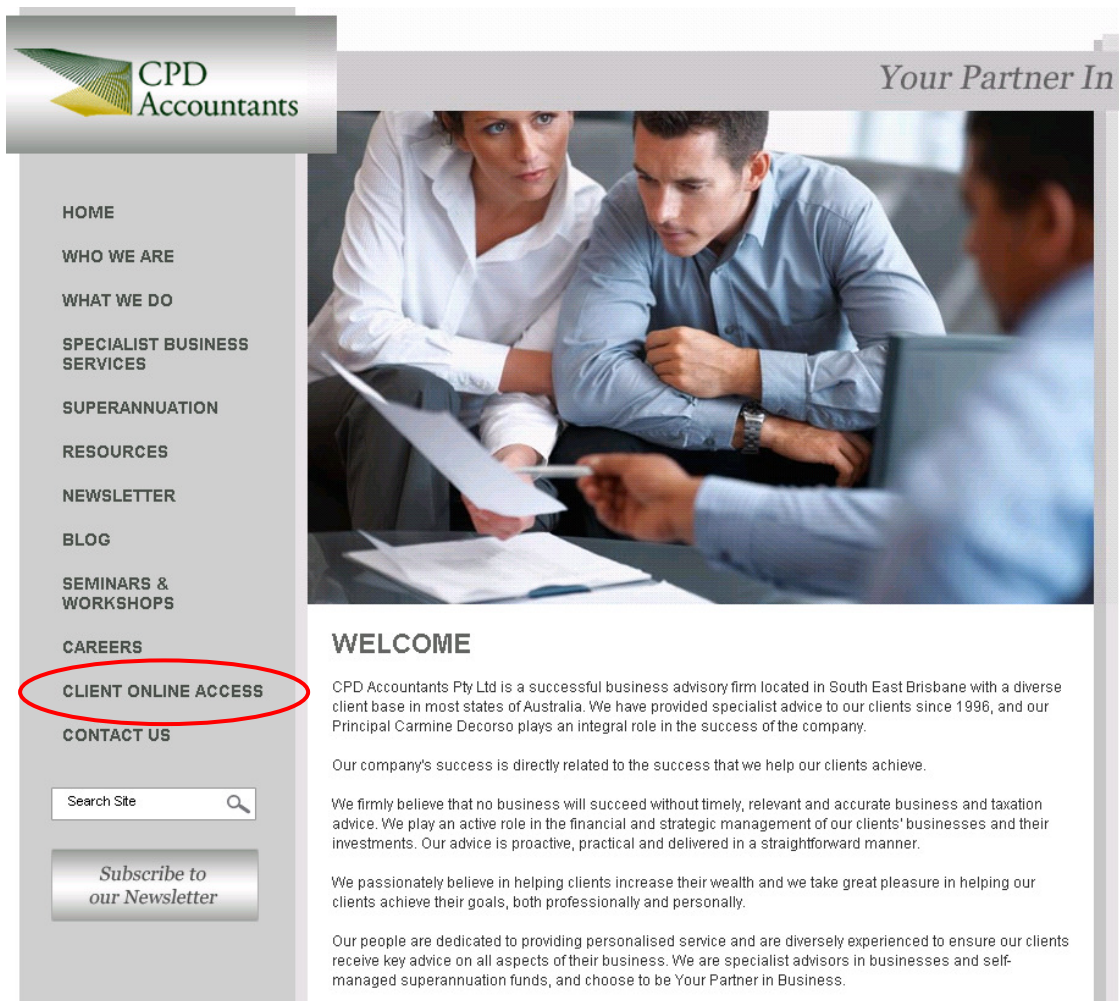
Welcome to the CPD Accountants Client Portal, an easy-to-use web based upload/download tool that will allow you to quickly and easily receive important documents from us, as well as enabling you to send documents and data files to us.

Instructions for Initial Login

- (1) Shortly after your account has been set up, you will receive an email from us titled “*Welcome to the CPD Accountants Client Portal*”. This email will contain your username and an automatically generated password, which you will be required to change the first time you login.

If you do not receive an email with your login details within a reasonable timeframe, please check the spam bin of your email program to ensure the notification has not been diverted there. If the email is not in the spam bin, please contact our office on +61 7 3245 9966.

- (2) First, go to the CPD Accountants Home Page (the web address can be found in your Welcome email) and click on the [Client Online Access](#) link in the left hand menu bar.



CPD Accountants

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WELCOME

CPD Accountants Pty Ltd is a successful business advisory firm located in South East Brisbane with a diverse client base in most states of Australia. We have provided specialist advice to our clients since 1996, and our Principal Carmine Decorso plays an integral role in the success of the company.

Our company's success is directly related to the success that we help our clients achieve.

We firmly believe that no business will succeed without timely, relevant and accurate business and taxation advice. We play an active role in the financial and strategic management of our clients' businesses and their investments. Our advice is proactive, practical and delivered in a straightforward manner.

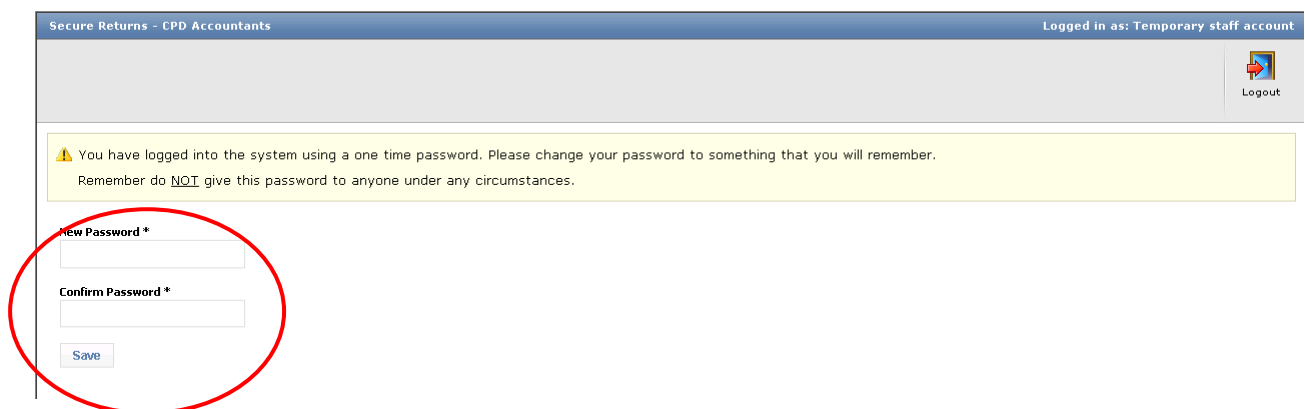
We passionately believe in helping clients increase their wealth and we take great pleasure in helping our clients achieve their goals, both professionally and personally.

Our people are dedicated to providing personalised service and are diversely experienced to ensure our clients receive key advice on all aspects of their business. We are specialist advisors in businesses and self-managed superannuation funds, and choose to be Your Partner in Business.

- (3) Once there, enter your username and temporary password, and click on the [Login](#) button.



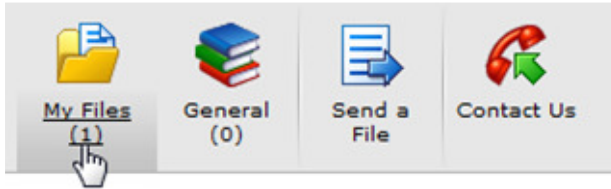
- (4) The first time you login, the Client Portal will ask you to create and confirm a new password of your choosing. Once you have entered your new password, be sure to click on the [Save](#) button.
Please note that changing your password at this stage is compulsory. To ensure the privacy and security of your data, please be sure never to share your login or password with anyone.



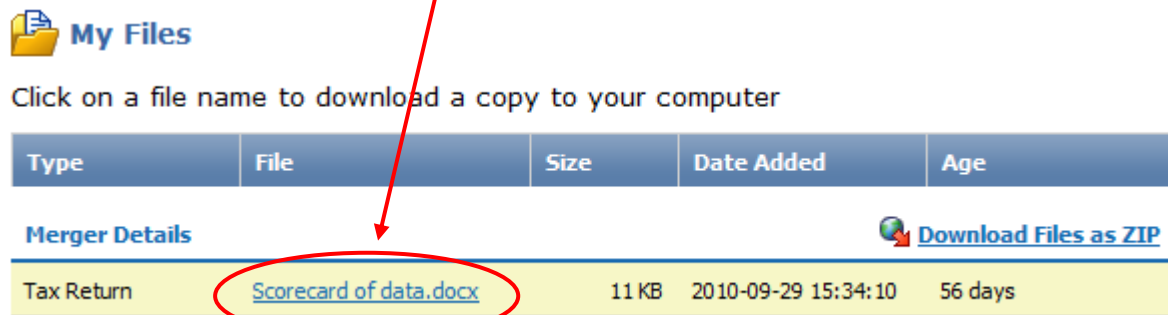
- (5) Once your new password has been saved, you will have full access to your Client Portal account.

Downloading a File

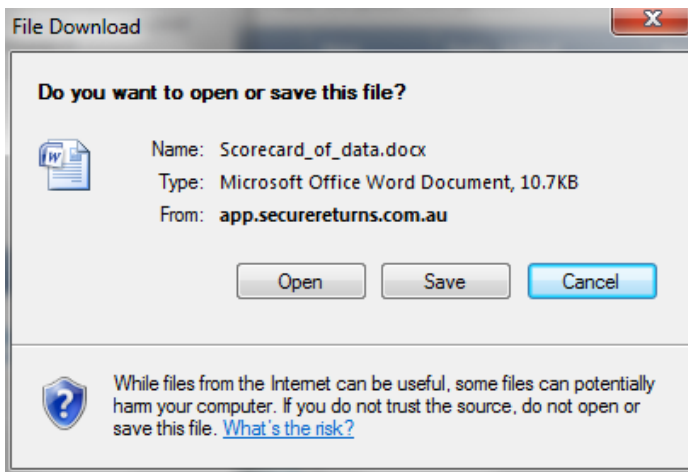
(1) Click on My Files



(2) To download a file, click on the file name or Download Files as ZIP to download all files in a folder at once

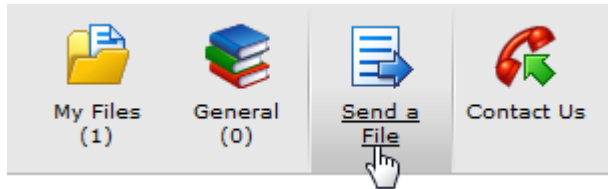


(3) Click on Open to view the file or Save to store it on your computer

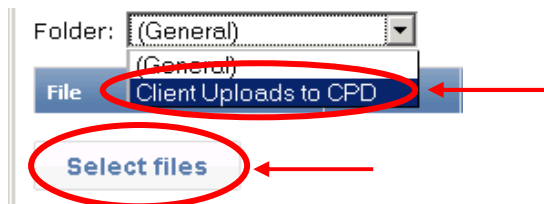


Uploading a File

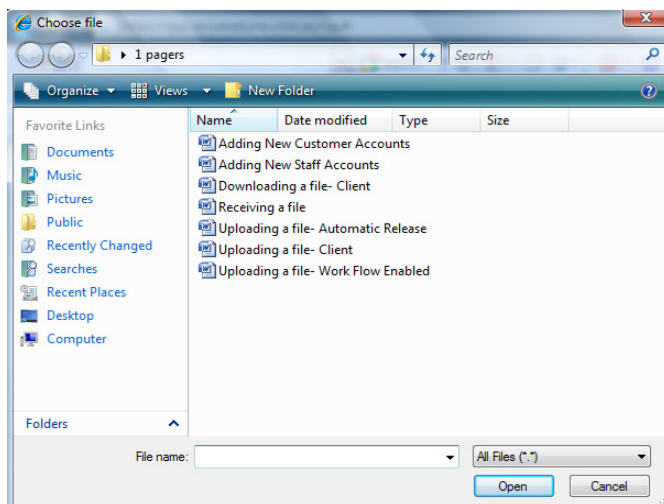
(1) Click on Send a File



(2) Select the Client Uploads to CPD folder from the drop down list and click on Select Files.




(3) Select the file you want to upload from your system and click on Open




(4) If you have selected the wrong file for uploading, simply click on the Delete File icon to the right of the file name and progress bar and repeat step 3.

Files I want to send


 You can add multiple files to the transfer queue, then press send
Maximum size is 250 MB per file

Folder:


File	Size	Progress	
Credit Card Payment Slip.doc	33 KB	<input type="text" value="0%"/>	

- (5) Click on Send to complete the upload. The progress bar will indicate how much of the file has been uploaded.


 **Files I want to send**

-  You can add multiple files to the transfer queue, then press send
Maximum size is 250 MB per file

Folder:

File	Size	Progress	
TLS Price List.pdf	351 KB	<div style="width: 51%; background-color: orange;"></div> 51%	

Once the upload is complete, the file name will appear in the Files I've Sent section at the bottom of the page. Please note that the larger the file, the longer it will take to upload.

 **Files I've sent**

You have not sent any files yet

File	Size	Date Added
Client Uploads to CPD		
Credit Card Payment Slip.doc	33 KB	2011-09-22 11:20:47
TLS Price List.pdf	351 KB	2011-09-22 11:48:39

Resetting a Forgotten Password

- (1) If you forget your password, you can easily reset it at any time. Go to the Client Online Access page on our website and click on [Help, I've Forgotten My Password](#).



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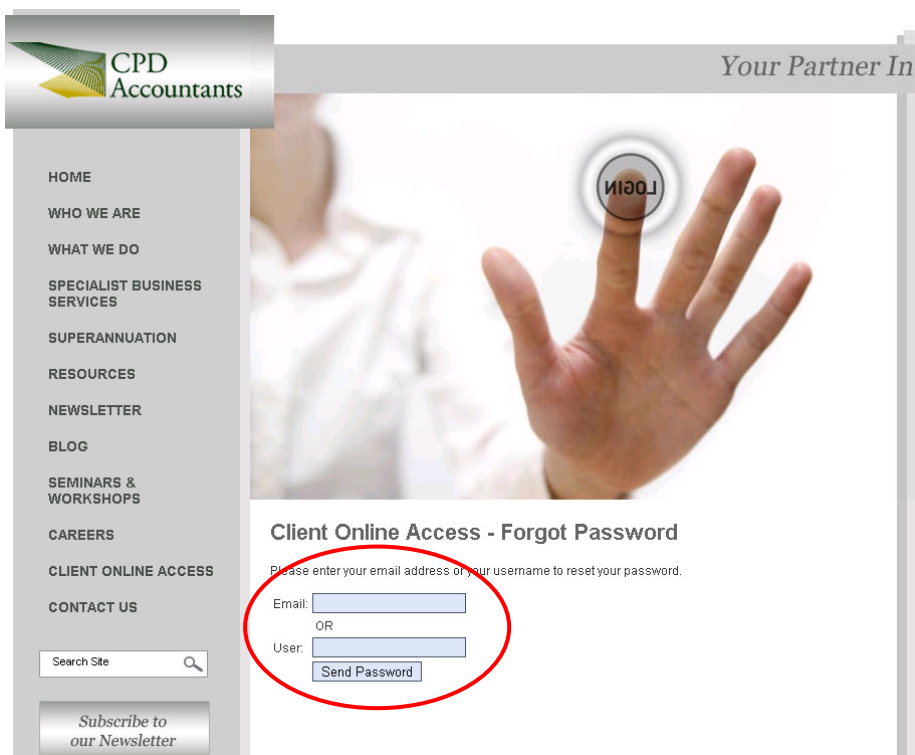
Client Online Access

Please enter your username and password to enter your secure client area.

User:
Password:

[Help, I've forgotten my password!](#)

- (2) You will then be asked to enter your username or email address. You can fill in either field, as your username should be the same as your primary email address. Once you have entered the information, click on the [Send Password](#) button.



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Client Online Access - Forgot Password

Please enter your email address or your username to reset your password.

Email:

OR

User:

- (3) Shortly after clicking on Send Password, you will receive an email containing a new automatically generated password. When you next login to the Client Portal, you will be asked to change the password to one of your own choosing. **Please note that changing your password at this stage is compulsory.** To ensure the privacy and security of your data, please be sure never to share your login or password with anyone.

Please refer to the [Instructions for Initial Login](#) section at the beginning of this user manual for instructions on how to change an automatically generated password to a password of your choice.

If you do not receive an email with your login details within one (1) hour of resetting your password, please check the spam bin of your email program to ensure the notification has not been diverted there. If the email is not in the spam bin, please contact our office on +61 7 3245 9966.

Contact Us

If you have any problems accessing your Client Portal account, please do not hesitate to contact us during business hours on +61 7 3245 9966.