Coleman&Associates
Fully Integrated Tax, Accounting & Financial Services

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, click the "Forgot Password?" link.
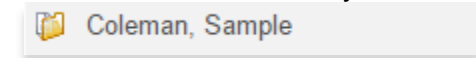
Once you are logged in
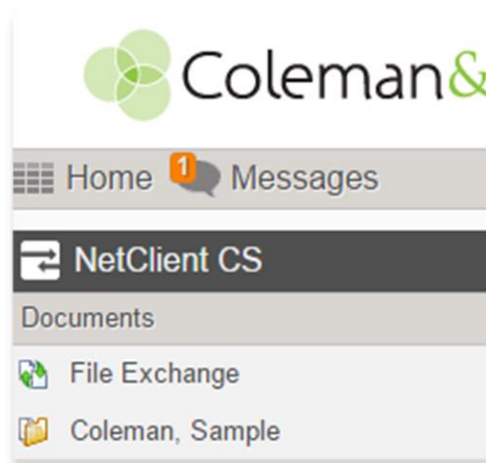
File Exchange and your Document Folders can be found on the left side of your portal.

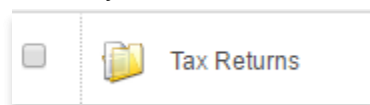Use File Exchange to send us files securely.

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

Document folders – how to view documents

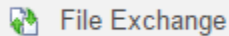Click on the folder with your name on it (or the name of your business).

Coleman, Sample
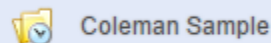
There you will find a folder called:

Tax Returns

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 documents

Click on File Exchange on the left.

File Exchange

Click on the folder with your name on it.

Coleman Sample

How to send files via File Exchange –
To add files, choose the Upload button.

Upload

A new window will appear, choose the Add files in the bottom left corner of the window to browse to your files, then Start upload to send the files to Coleman.

Add files   Start upload

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

How to download files from File Exchange –
To download individual files, check the box to the left of the file(s).

Name

Example.docx

Then choose Download Selected.

Download Selected

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

Download All

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