

Accessing the Portal

1. Go to the following website: www.clientaccess.com (Ctrl + Click to follow this link)
2. Your Login ID is your Email address
3. You will receive an email with a temporary password (this will need to be changed the first time you login).
4. Password requirements - the new password you create must meet the following criteria for security purposes:
 - Number(s) (at least one)
 - Capital and lowercase letters
 - Symbol(s) (at least one)

**ANDERSON ZURMUEHLEN & CO.,
P.C.**

User ID

Password

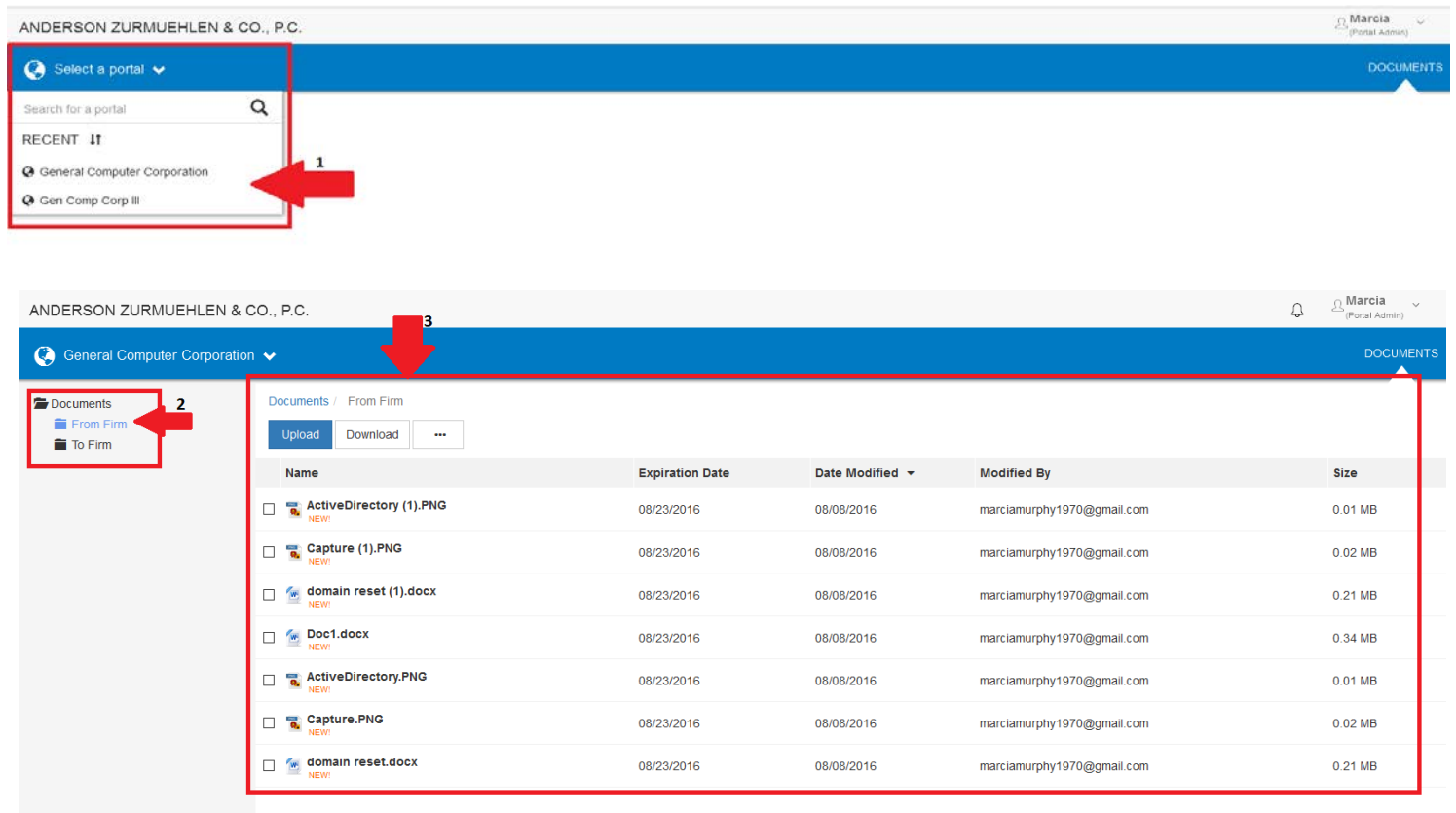
Save User ID

[Forgot password?](#)

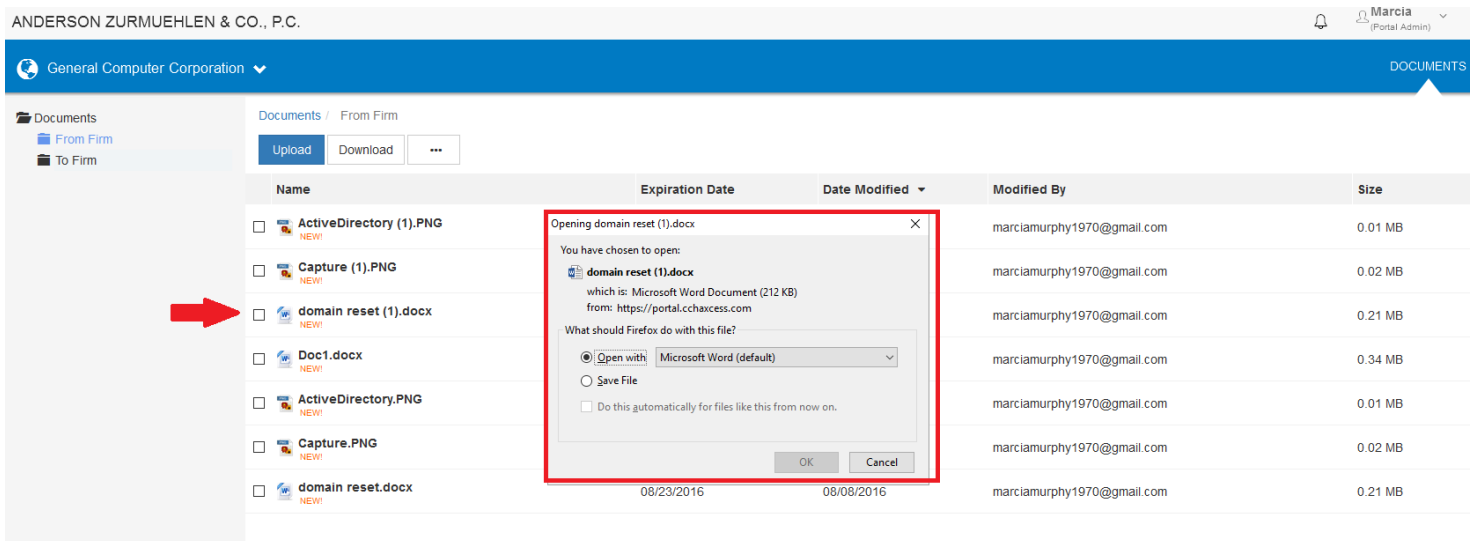
Log In

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V 1.0

Overview of the Portal screen



1. List of the portals we have created for you. If you have multiple portals, select the one you would like to work on first.
2. Folders containing the documents uploaded by you (To Firm), or uploaded to you from the firm (From Firm).
3. A list of the files contained in the selected folder. All files have an expiration date of 15 days.



To open a file we have uploaded to you, double click the file name, select the program you would like to open the file with or save the file to a location. Select OK. Your file will open.

Alternative method: Click the box next to the file, click the Download button. The open file box will appear.

ANDERSON ZURMUEHLEN & CO., P.C.

General Computer Corporation

Documents / To Firm

Upload Download ...

Name	Expiration Date	Date Modified
<input type="checkbox"/> domain reset.docx	08/30/2016	08/15/2016
<input type="checkbox"/> PaulSepp Checkpoint tools error.docx	08/30/2016	08/15/2016
<input type="checkbox"/> CCH ENGAGEMENT CLIENT DELETION FORM.docx	08/23/2016	08/08/2016
<input type="checkbox"/> IE Reset.docx	08/03/2016	07/19/2016
<input type="checkbox"/> PlanarMonitor_Reset.docx	07/21/2016	07/06/2016

File Explorer

Quick access

Documents This PC

Desktop This PC

System32 Local Disk (C:)\Windows

Recent files (20)

Portal InstructionsOriginal.docx

Portal Instructions.png

Portal Instructions 2.png

Anderson ZurMuehlen Portal.msg

SWZimmerman.docx

prmet.ini

T550 Parts list.xlsx

Spam TimCooper.PNG

27 items 1 item selected 599 KB

Upload Queue

Overall progress:

Portal	Name	Size	Progress	Status	Actions
General Computer Corp...	SWZimmerman.docx	0.59 MB			Cancel Remove

Upload All Remove All

1. Double click to open the *To Firm* folder.
2. Open your File Explorer drag the selected file to the open space under the existing files.
3. The *Upload Queue* will open up. You can continue to drag files into this box or the open space under existing files. When you have all the files in the queue, click the *Upload All* button or the cancel/remove if needed.