



CCH Access™ Share Safe Instructions

Send a file with Share Safe.

You can send up to 20 files per message, up to a limit of 1 GB total size.

One of our firm's staff can send you a link, or you can go to our website www.finenti.cpa Client Portal page and click on the button to upload files. Both of these options will open a Finenti Web browser page for you to upload files.

Enter your email address and name. You also have the option to enter your company name and contact number, but this is not required.

Enter the characters shown in the Captcha box into the Secure Code box. Note the characters are case sensitive.

Click Send a File.

In the Send File To box, select the name of the Finenti staff member you are sending the file to. This will send an email to that staff member to notify them that you have uploaded a file. However, all files you upload will be available for the firm to access.

Enter a subject for the message.

Enter your message.

To add files to the message, either drag and drop files into the Files box, or click Add File to select files.

Click Send.

Close your web browser to log out.

Receive a file with Share Safe.

When a firm member sends you a file, you will receive two emails. One email notifies you that the firm has sent you a file. The second email contains the sign in verification step required for you to access the file.

In the second email, click on the "Click here to authenticate your identity" link. The firm would have selected either a cell phone number or email address for your authentication. Click on Send the Code to receive the verification code.

Once you enter the verification code, you will be taken to the Share Safe web browser containing the files. Select the files and click Download. You can save these files on your computer.

Note: If multiple files are selected and downloaded at one time, they will be packaged in a ZIP file.

Note: Older files that you have received from the firm, or uploaded to the firm, may also be shown. Files are automatically removed from Share Safe after 30 days, or can be purged earlier by the firm upon request.

Click log out, or close your web browser to log out, when you are finished.