Instructions for uploading files to cmccpas.com

Please name the file(s) with the taxpayer's last name and/or business name to ensure file recognition.

1. **Open your QB file or locate file(s) you want to upload by saving to your desktop (to locate faster, you can save to your preference after). Skip to #5 for non QB file(s).**
2. **Go to *File* tab (for QB file).**
3. **To create backup, click *create backup* and save to desktop (you can save to your preference after).**
4. **For an accountant's copy, click *accountant's copy*, then click *client activities*, and save to your desktop to locate faster (you can save to your preference after).**
5. **If you have just 1 file, go to step #7.**
6. **If you have more than one file to upload, place all your files that you want to upload on your desktop.**
   a. **then click on any blank space on your desktop and hold the left mouse curser to highlight the proper files (they will be highlighted light blue). Un-hold the left mouse curser once done.**
   b. **then right click on any highlighted file and select *send to* and choose *compressed "zipper" folder***
   c. **save to your desktop for easier search.**
      (To undo a file you do not want included, hold the "CTRL" button from keyboard and click on that file or delete it from the zipper folder. You can verify if all of the files are in the zipper folder. If any are missing, use your mouse to drag and drop the missing file(s) to the zipper folder).
7. **Click *upload a file* from our website.**
8. **Then click *select files*.**
9. **From option *look in*, choose *desktop* or locate your file(s) from the drop-down menu.**
10. **Click *find file* and locate the file or zipper folder to upload.**
11. **Click *open*.**
12. **Click *start up file* and wait for upload to complete. Your uploading box will disappear once uploading is complete.**

E-mail or call Duby for assistance. 770-972-6393 dosorio@cmccpas.com