

Navigating the Portal



Step 1

Go to www.mannassoc.cpa and Start Process



(619) 222-5900



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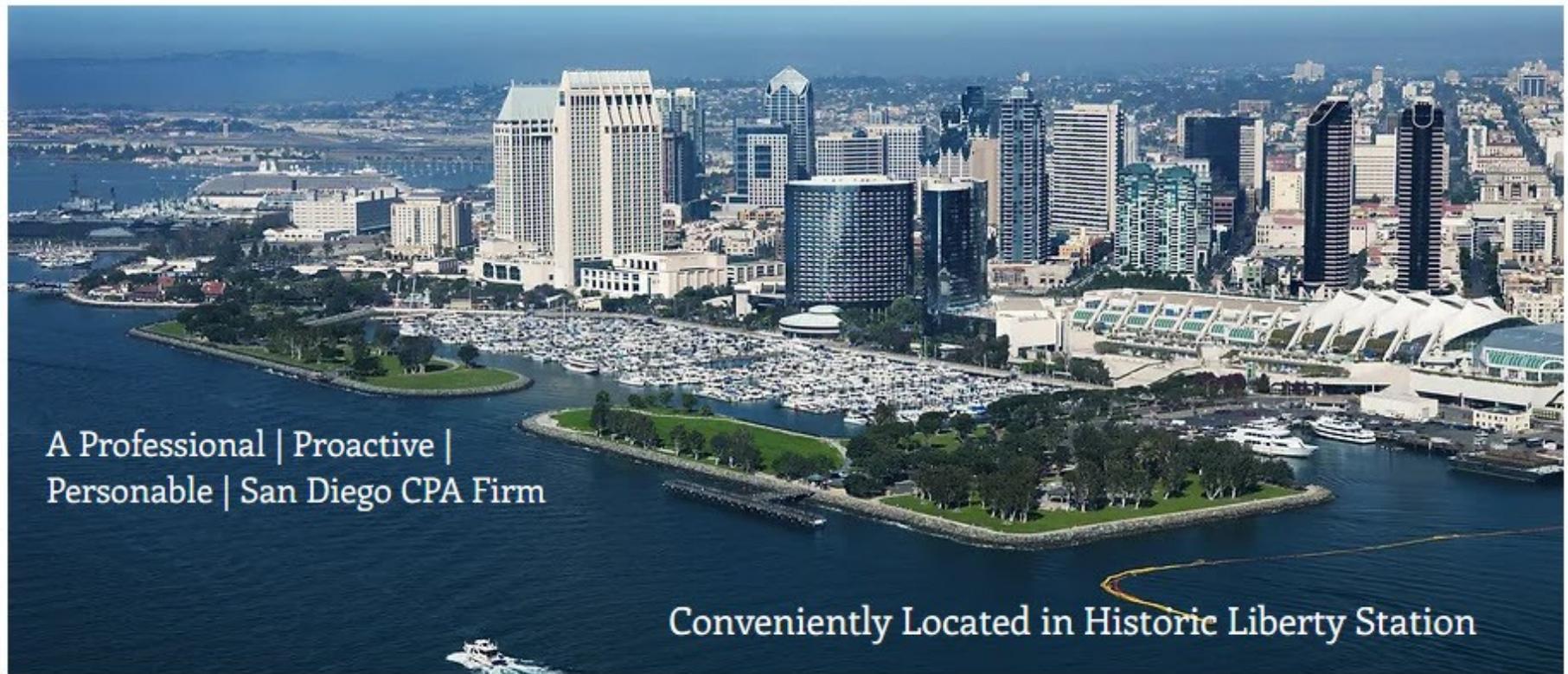
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A Professional | Proactive |
Personable | San Diego CPA Firm

Conveniently Located in Historic Liberty Station

Step 2 Go to Resources and Click for Portal Access

Mann & Associates APC
Certified Public Accountants

(619) 222-5900

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Resources

Mann & Associates Secure Portal [Click here to download and upload your materials.](#)

To download documents "From the Firm" and to upload your documents "To the Firm" click on the above link. Enter your email associated with your account and the password you chose for your account. When the portal opens, click on Shared Folders to find the "From" and "To" folders.

Internal Revenue Service [Click here for information.](#)

State of California Franchise Tax Board [Click here for information.](#)

California Secretary of State Alex Padilla [Click here for information.](#)

Step 3

Enter Your Login Information.
Reset Your Password if You Need To.

A login form consisting of three stacked rectangular boxes. The top box is light gray and contains the text 'Email'. The middle box is also light gray and contains the text 'Password'. The bottom box is solid blue and contains the text 'Sign In'. Three red arrows point from the left towards the 'Email' field, the 'Password' field, and the 'Sign In' button.

[Forgot Password?](#)

[Privacy Policy](#)

citrix_™

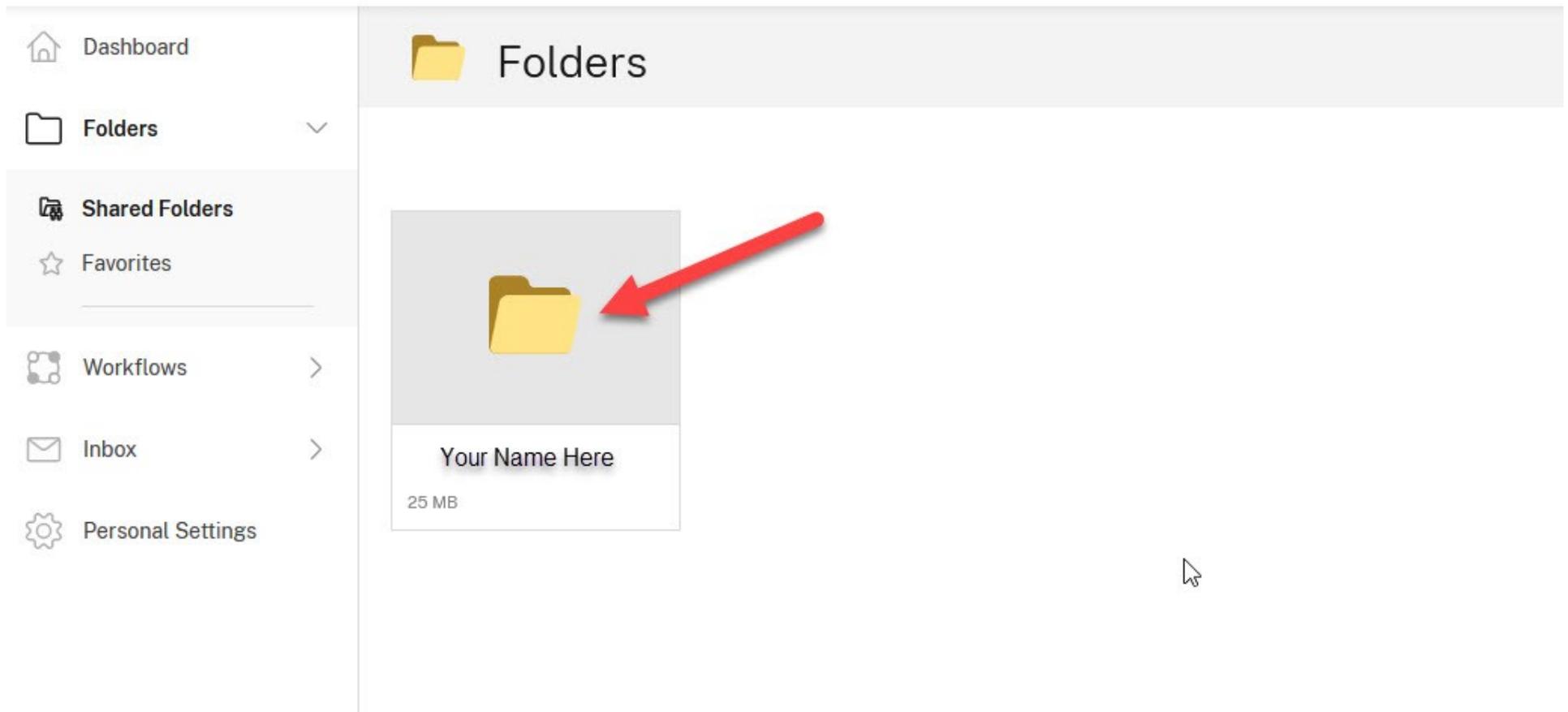
Step 4 Click on Folders > Click On Shared Folders

The screenshot displays the Citrix ShareFile user interface. On the left, a navigation sidebar contains several menu items: Dashboard (with a home icon), Folders (with a folder icon and a dropdown arrow), Shared Folders (with a folder and people icon), Favorites (with a star icon), Workflows (with a flow icon and a right arrow), Inbox (with an envelope icon and a right arrow), and Personal Settings (with a gear icon). A black arrow points from the top of the sidebar to the 'Folders' menu item, and a red arrow points from the 'Folders' menu item to the 'Shared Folders' menu item. The main content area at the top right shows the 'citrix | ShareFile' logo, a search icon, and a 'Help' link. Below the logo, there is a 'Hello' greeting with a profile picture placeholder and a link to 'Add profile picture'. A central notification box contains a lightbulb icon and the text: 'Welcome! Please remember the information below. Sign-In Page: mannassociates.sharefile.com'. At the bottom, a 'Shortcuts' section features two circular icons: 'Shared Folders' (with a folder and people icon) and 'Favorites' (with a star icon).

Step 5

Click on Your Folder for Both Downloads and Uploads

citrix | ShareFile



The screenshot displays the Citrix ShareFile interface. On the left is a navigation sidebar with the following items: Dashboard (home icon), Folders (folder icon, dropdown arrow), Shared Folders (shared folder icon), Favorites (star icon), Workflows (workflows icon, right arrow), Inbox (envelope icon, right arrow), and Personal Settings (gear icon). The main content area is titled 'Folders' and shows a single folder card. The card features a yellow folder icon, the text 'Your Name Here', and '25 MB' below it. A prominent red arrow points to the folder icon. A mouse cursor is visible in the bottom right corner of the interface.

Step 6 Click on Your Folder for Downloads “From Firm”

citrix | ShareFile

Dashboard

Folders

Shared Folders

Favorites

Workflows

Inbox

Personal Settings

Folders > [Redacted]

[Folder Icon] Your Name Here ... More Options

Check Box to Open from Firm and Download Documents and Organizer

Select All

| | | | |
|--------------------------|---------------|---------------------------|--------|
| <input type="checkbox"/> | [Folder Icon] | From Firm - 2022 Tax F... | 806 KB |
| <input type="checkbox"/> | [Folder Icon] | To Firm - 2022 Tax Folder | 25 MB |

Step 7

Click on Your Folder for Downloads “From Firm”

citrix | ShareFile 🔍

Dashboard
Folders
Shared Folders
Favorites
Workflows
Inbox
Personal Settings

Folders > > From Form - 2022 Tax Folder

From Firm - 2022 Tax Folder ... More Options

Select All Or Check from the Documents Below to Download Separately

Check the Select All Box for All Documents Download

| | | | | | | | |
|--------------------------|--|--------------------------|---|--------------------------|--|--------------------------|--|
| <input type="checkbox"/> |  | <input type="checkbox"/> |  | <input type="checkbox"/> |  | <input type="checkbox"/> |  |
| | 2022 Admin Policy.pdf | | 2022 Tax Organizer.pdf | | 2022 Transmittal Letter... | | Engagement Letter.pdf |
| | 80 KB | | 211 KB | | 123 KB | | 157 KB |

| | |

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Step 8 Click on Documents You Want to Download

citrix | ShareFile 🔍

Dashboard
Folders
Shared Folders
Favorites
Workflows
Inbox
Personal Settings

Folders > From Form - 2022 Tax Folder

From Firm - 2022 Tax Folder ... More Options

Download Delete Move Copy More

Select All Download the Documents You Checked You Wanted

| | | | |
|---|--|---|--|
| <input checked="" type="checkbox"/>  2022 Admin Policy.pdf 80 KB | <input checked="" type="checkbox"/>  2022 Tax Organizer.pdf 211 KB | <input checked="" type="checkbox"/>  2022 Transmittal Letter... 123 KB | <input checked="" type="checkbox"/>  Engagement Letter.pdf 157 KB |
| <input checked="" type="checkbox"/>  | <input checked="" type="checkbox"/>  | | |

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Step 9

Return to Folder > Shared Folder and Click on Your “To Firm” Folder > Select + to Upload Documents

citrix | ShareFile

Search Help Apps Log

Dashboard

Folders

Shared Folders

Favorites

Workflows

Inbox

Personal Settings

Folders > [redacted] > To Firm - 2022 Tax Folder

To Firm - 2022 Tax Folder ... More Options

Click Here to Upload Your Documents Once They Are Uploaded the Screen will Look Like This

Select All

Sort By Name

| | | | | | | | |
|--------------------------|-------------------------|--------------------------|------------------------|--------------------------|-------------------------|--------------------------|-------------------------|
| <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | |
| | 2021-Form-1040-V-Alm... | | 2022 Tax Organizer.pdf | | 2022-Brokers-Tax-Sum... | | 2022-Form-1040-ES-AL... |
| | 426 KB | | 211 KB | | 3 MB | | 2 MB |
| <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | | <input type="checkbox"/> | |

+

Step 10 Logout

