



Client Portal Demonstration

To Access the Demo Portal

1. From the Rounsfull & Associates, Ltd. website (www.rounsfull.com), click on the “Client Login” link from the menu on the left.
2. Login using the following:
 - a. Login: rounsfulldemo
 - b. Password: password

R&A Client Portal Features

“File Exchange Explorer”

- Files can be uploaded to your portal for download by R&A and vice versa.
- Allows you to easily share large files that exceed the size limit for email attachments.

“Document Presentation ”

- View and print PDF copies of your current and prior year tax returns, financial statements and other important documents.
- Your information is available to you whenever and wherever you need it—all that is required is an Internet connection!

“Client Bookkeeping Solution” (CBS ASP)

- Manage your bookkeeping records online from anywhere you have Internet access,* and share the data easily with your accountant .
- Eliminate the risk of data loss and time-consuming backup procedures—your data resides and is backed up regularly offsite.
- No need to buy and install software updates—the software is maintained on the server end, rather than on your computer. Updates and revisions are applied seamlessly , and you save yourself the headaches and hassles of software installation .
- Save additional time by utilizing R&A’s full-charge bookkeeping services. We do the work, but you have 24/7 access to your transactions and balances.

*CBS ASP access requires a one-time installation of the Citrix web client software on any computer used to access the program. Installation of the Citrix software is required to run the full demo version of CBS ASP. If you would like to demo the CBS ASP program, please contact Lauren at (847) 832-9470, Ext. 12 for a walkthrough of the Citrix installation and CBS ASP program.