



## Guide to our 2020 Client Information Forms

### Overview

1. [Confirming your details](#)
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### INITIAL SETUP

If this is the first time you've received an electronic Client Information Form (CIF) from us, there's a quick verification process you need to go through.

This basically involves:

1. [Confirming your details](#)
2. [Setting up a password](#)

### CONFIRMING YOUR DETAILS

- a) The first email you receive will look something like this:

John White via Xero      Client Information Form - Business for Acme Rocket Company Limited

- b) To get started, open the email and click the 'Answer questions' button:

**Answer questions**

- c) This will then open a web browser, and display the following information:

### Questions to answer from Business One Limited

To protect your financial information, you need to create a secure login. Use these details for whenever you need to answer questions from your advisor.

#### Full name

First name	Last name
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#### Email

Email address
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- d) Upon filling in the detail you'll receive the following message:

**Hi John, you're almost there!**

Check your inbox to verify your email address  
and create a secure password.

- e) Check your inbox for an email that looks like this:

Xero **Confirm your email address**

- f) In the body of the email click the blue 'Yes, it's me' button:

Hi John, it's great to meet you.

We'd like to make sure we got your email address right.

**Yes, it's me – let's get started**

## SETTING UP A PASSWORD

This is simply to keep your data safe.

It also allows you to come back at any time, and add more information to your CIF.

- g) To set up a password, enter the following details and click 'Activate your account':

**Activate your account**

Your password needs to contain at least 8  
characters, including one or more numbers

Password

Phone number

New Zealand ▼

**Activate your account**



## FILLING IN YOUR CIF

You'll then be welcome into your electronic CIF, which should look something like this:

Acme Rocket Company Limited Client Information Form - Business

1 Welcome	Business One Limited
2 Client Information Form	Hi John, We need you to answer some questions for us
3 Bank Information	
4 General Details	<b>There are 69 questions to answer</b> 17 of them require documents to be attached
5 Covid-19 Wage Subsidy	<b>You don't have to answer all the questions now</b> If you can't answer a question, you can come back to it later
6 Cash on Hand	
7 Stock on Hand / Inventory	<b>Your responses are automatically saved</b> Pressing submit will notify your advisor that you've answered
8 Debtors / Accounts Receivable	
9 Creditors / Accounts Payable	<a href="#">Get started</a>

### Key Points

- You only need to fill in the details relevant to you
- Section 2 is the only compulsory section
- Your form automatically saves as you add answers
- You can quit and come back to it at any stage through the link in your CIF email

### Navigation

- You can navigate between section by clicking 'Next' or 'Back' buttons, or simply clicking the heading from the left hand column
- If you have supporting documents, these can be attached to most questions by clicking 'Attach files' and then uploading these from your computer
- Some sections like 'Rental Property Income' have supporting documents for you to download and fill in. You will see these listed where applicable under the question.

## HELP

If you need a hand with any part of the process, feel free to reach out to us on the following:

**Thames Office** [thames@businessone.co.nz](mailto:thames@businessone.co.nz)

07 868 6461

**Whitianga Office** [whitianga@businessone.co.nz](mailto:whitianga@businessone.co.nz)

07 866 5418