



Guide to our 2023 Client Information Forms

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INITIAL SETUP

If this is your first time filling in 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



- 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	There are 69 questions to answer 17 of them require documents to be attached
5 Covid-19 Wage Subsidy	You don't have to answer all the questions now If you can't answer a question, you can come back to it later
6 Cash on Hand	
7 Stock on Hand / Inventory	Your responses are automatically saved Pressing submit will notify your advisor that you've answered
8 Debtors / Accounts Receivable	
9 Creditors / Accounts Payable	Get started

Key Points

- You only need to fill in the details relevant to you
- Section 2 (accepting the Terms of Engagement) 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
- If attaching files, and the 'attach' button is greyed out, try typing something into the text box above

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
07 868 6461

Whitianga Office whitianga@businessone.co.nz
07 866 5418