

How to Securely Send Us Your Documents

Your financial records contain some of the most sensitive information about your business — bank account numbers, payroll data, Social Security numbers, and tax identification numbers. Sending that information through ordinary email or text puts it at real risk, because those channels are not encrypted end to end and copies remain on servers and devices outside anyone's control.

We use QuickBooks Online as our secure document channel. Everything you send us goes through your QuickBooks Online company file, where it is encrypted in transit and at rest and tied to your own login. Please use QuickBooks for all documents you send us, and do not send financial or personal information by email or text.

Getting set up (one time)

1. **Accept our invitation.** We will send an email inviting Sunbelt to your QuickBooks Online company as your accountant. Open it and follow the prompt to accept.
2. **Create a strong, unique password** for your QuickBooks account — one you do not use anywhere else. A password manager makes this easy.
3. **Turn on two-step verification** in your Intuit account settings. This is the single most effective thing you can do to protect your financial data.
4. **Confirm the "My Accountant" tab appears** in the left-hand menu of your QuickBooks Online account. That is where you will see our requests and send us documents.

If the invitation email does not arrive, check your spam folder, then email us at hello@sunbeltaccountingservices.com and we will resend it.

Sending documents we have requested

This is the method we prefer, because it keeps each document matched to the item we asked about.

1. Sign in to QuickBooks Online.
2. Click **My Accountant** in the left-hand menu.
3. You will see a list of requests from us. Click the request you want to respond to.
4. Click to add an attachment, select your file, and add a note if anything needs explaining.
5. Click to send or mark the request complete.

We receive a notification as soon as you respond, so there is no need to email us separately to let us know.

Sending documents we have not asked for

If you have something to send us that isn't tied to a request — a new loan statement, a receipt for a large purchase, a letter from a tax authority — you have two good options.

Attach it to the transaction it belongs to. Open the transaction in QuickBooks, then use the attachment option within it. This is the best choice for receipts and invoices, because the document stays permanently linked to the entry in your books.

Add it to your Attachments list. In QuickBooks, go to **Settings** (the gear icon) → **Lists** → **Attachments**, then upload the file there. Use this for documents that don't belong to one specific transaction. Please email us at hello@sunbeltaccountingservices.com to let us know you've uploaded something this way, since this method doesn't notify us automatically.

A note on file types and sizes

QuickBooks accepts common document and image formats, including PDF, JPEG, PNG, Word, Excel, and CSV. If a file is rejected as too large, try one of these:

- Scan or export at a lower resolution
- Split a long document into two or three files
- Send it as a PDF rather than a set of photos

If you can't get a file to upload, contact us and we'll find another approved way to get it.

Please don't send photographs of documents taken with your phone camera app unless we specifically ask. Scan them or save them as PDFs instead. Phone photos are often unreadable at the edges, and they tend to end up traveling through text messages and photo-sharing apps along the way.

Please do not use these channels

Do not send us financial records or personal information by any of the following. If you do, we may not be able to accept the documents, and we may ask you to resend them through QuickBooks.

- Regular (unencrypted) email or email attachments
- Text message or SMS
- WhatsApp, Facebook Messenger, Instagram, or other consumer messaging apps
- Social media messages of any kind
- Fax
- Public or "anyone with the link" cloud sharing links
- USB drives or other portable media sent by mail
- Photos shared through your phone's photo-sharing feature

This applies with particular force to anything containing a Social Security number, taxpayer identification number, driver's license or passport number, date of birth, bank account or card number, or payroll and wage detail.

Never send us your banking passwords

We do not need and will never ask for your online banking username or password.

QuickBooks connects to your bank through a secure, read-only bank feed that you authorize yourself, directly with your bank. That connection lets us see transactions without ever holding your credentials. If anyone contacts you claiming to be from Sunbelt and asks for a banking password, a one-time passcode, or remote access to your computer, **it is not us** — do not provide it, and please tell us right away.

The same goes for the access we have to your books: we work with the permissions you grant inside QuickBooks. We have no authority to sign checks, move money, or authorize payments on your behalf, and we will never ask for it.

Watch for payment-instruction fraud

Invoice and payment fraud is common in our industry. Please follow these two rules:

1. **If you receive a message that appears to be from us changing our payment or remittance instructions, do not act on it.** Call or email us at the contact information on this website to confirm first, using a number or address you look up yourself rather than one in the message.
 2. **We will never ask you to redirect a payment urgently.** Urgency is the most reliable sign of a fraudulent request.
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When your lender, tax preparer, or someone else asks for your financials

You own your books, and you're free to share your reports with anyone you choose. Two things are worth knowing before you do.

Send them yourself, and tell us what they need. Rather than asking us to send reports directly to a third party, download what you need from QuickBooks and send it along yourself, or tell us and we'll get you a clean copy. That keeps you in control of what leaves your hands, and it means you know exactly what the recipient received. If you'd like us to send something directly to your CPA or attorney, just let us know in writing and we're glad to.

Understand what our reports are and aren't. The statements and reconciliations we prepare are internal management reports built from the records you give us. They are not audited, reviewed, or compiled financial statements, and they don't carry an accountant's opinion or any form of assurance. If a lender, investor, buyer, insurer, or government agency asks for financials with an accountant's opinion attached — or uses words like "audited," "reviewed," or "compiled" — that is a different service and requires a CPA. We're happy to help you understand what's being asked for and to hand your books over to whoever performs that work.

Along the same lines, please don't describe our reports as audited or verified, and please check with us before using our name or logo in anything you submit to a third party. This isn't about secrecy — it's that representing management reports as something more can create real problems for you as well as for us.

If you send something the wrong way by accident

It happens, and telling us quickly is the right move. Email us at hello@sunbeltaccountingservices.com and let us know what was sent and how. Depending on what the document contained, we may recommend steps such as monitoring the affected account or notifying your bank. We will not accept documents received through an unapproved channel as a matter of course, and we may delete them and ask you to resend — this is to protect you, not to be difficult.

Quick reference

Task	Where to go
Respond to a document request from us	QuickBooks Online → My Accountant

Send a receipt or invoice for a specific transaction

Open the transaction → attach the file

Send a general document

Settings → **Lists** → **Attachments**, then email us

Ask a question

hello@sunbeltaccountingservices.com

Report a suspicious message or accidental send

hello@sunbeltaccountingservices.com

Questions

If any of this is unclear, or if you'd like us to walk through it with you on a call, email **hello@sunbeltaccountingservices.com** and we will set up a time. We would much rather spend fifteen minutes getting this right at the start than deal with a data problem later.

These instructions describe the secure pathways referenced in our engagement letter and Standard Terms of Service. If we change them, we will let you know.