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## Sharing data with your accountant and farm adviser

At any time, you can invite your accountant to view your Cashminder farm financial records online. This is the most efficient way to share data with your accountant. You can also invite your farm adviser to view your financial data in the same way.

### Steps for the Accountant

Talk to your accountant and ask them to do the following...

1. Ask them to visit [www.cashminder.ie](http://www.cashminder.ie)
2. They click on **Sign up** at top right (<https://portal.cashminder.ie/Account/Register>)
3. They enter their own preferred username & password and then they click **Sign Up**.
4. Let's say for this example that the accountant's username is farmacc101.
5. Your accountant then needs to inform you that farmacc101 is their username.

### Steps for the Farmer

1. Log in to [www.cashminder.ie](http://www.cashminder.ie)
2. In the initial screen where your farm name is listed, click on **Access and Security** on the right hand side, for the farm that you want to share with this accountant.
3. Click on the **New Invite** option.
4. Enter your accountant's username beside **User to Invite**. (farmacc101 in this example).
5. Select the **Adviser** option beside **Security Roles**.
6. Select **Edit** beside **Actuals Access**.
7. Select **Edit** beside **Budgets Access**.
8. Click on the **Invite** button.
9. The next time this accountant logs in to their username, they will see the invite from your farm, accept it, and they can access this farm's data from then on.

## Advantages of linking to advisers and accountants like this

1. Each time your accountant, or farm adviser, logs in to your farm, an audit record is entered so you can see that this access happened. This is available on the right hand side of the **Access and Security** screen.
2. If your accountant makes changes to data, these changes are audited as well.
3. You can break the link to an accountant or farm adviser at any time in **Access and Security**.
4. You do not need to email data to your accountant. They can just login and see the data themselves at any time.

Note that there is a short manual called **Farmer check list for Accounts** that shows a farmer what needs to be done to prepare good data for your accountant.

There is also a short manual called **Accountant check list for Accounts** which can be used by an accountant to check the quality of data before using Cashminder data for tax computations and other purposes.