



2014 SecureFilePro Client's Help Document

Revised 6/12/14



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Client Log In Instructions:

You will receive an email once a SecureFilePro™ portal has been created for you. The email will provide you with detailed instructions as to how you log into the portal and set your password. The link in the email is good for 48 hours, if you do not activate your account within the 48 hours you will need to call your preparer and ask them to reset your password.

Steps for logging on to the Portal for the first time.

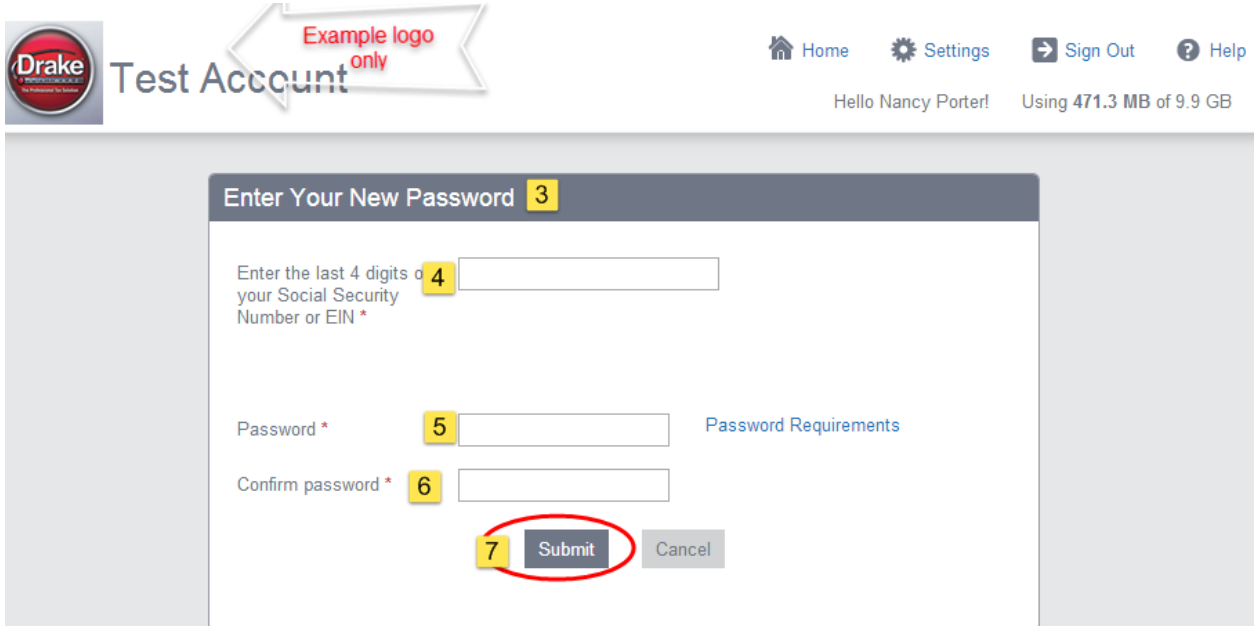
1. Make sure you have internet access.
2. Click the link within the email notification you received. The link should be in blue underlined text and start with <https://.....>
3. A screen will appear titled "Enter Your New Password". Note the password requirements below.

Password Requirements

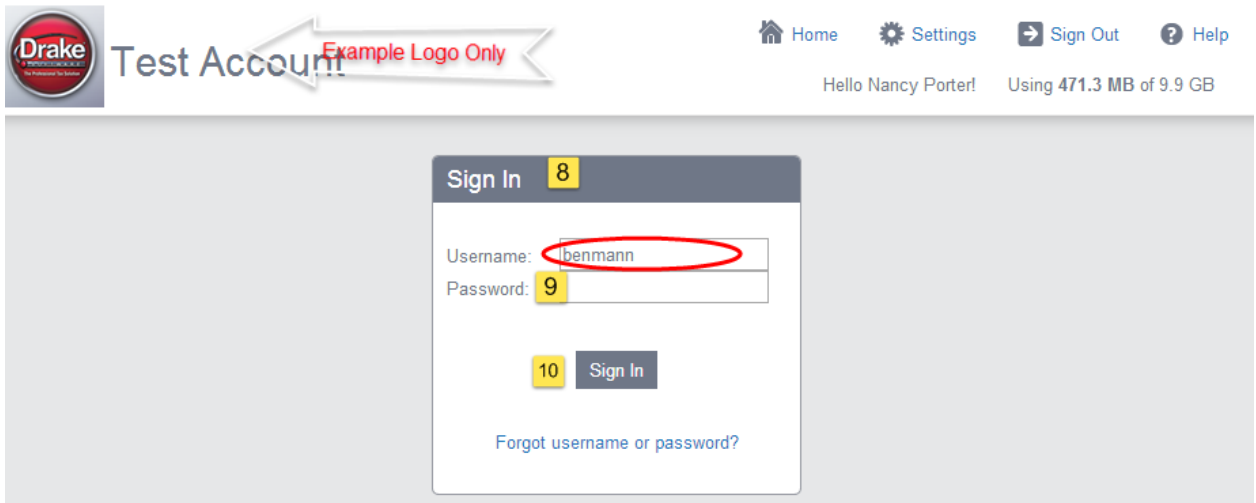
Minimum 8 characters
Contains at least one upper case letter
Contains at least one lower case letter
Contains at least one number
Contains at least one special character
Cannot contain spaces

4. Enter the last 4 digits of your Social Security Number
5. Enter a password
6. Reenter your password in the Confirm password field.
7. Click Submit

Steps for logging on to the Portal for the first time (continued)



8. The **Sign In** screen will appear, with your user name displayed
9. Enter the password you just created
10. **Click** Sign In

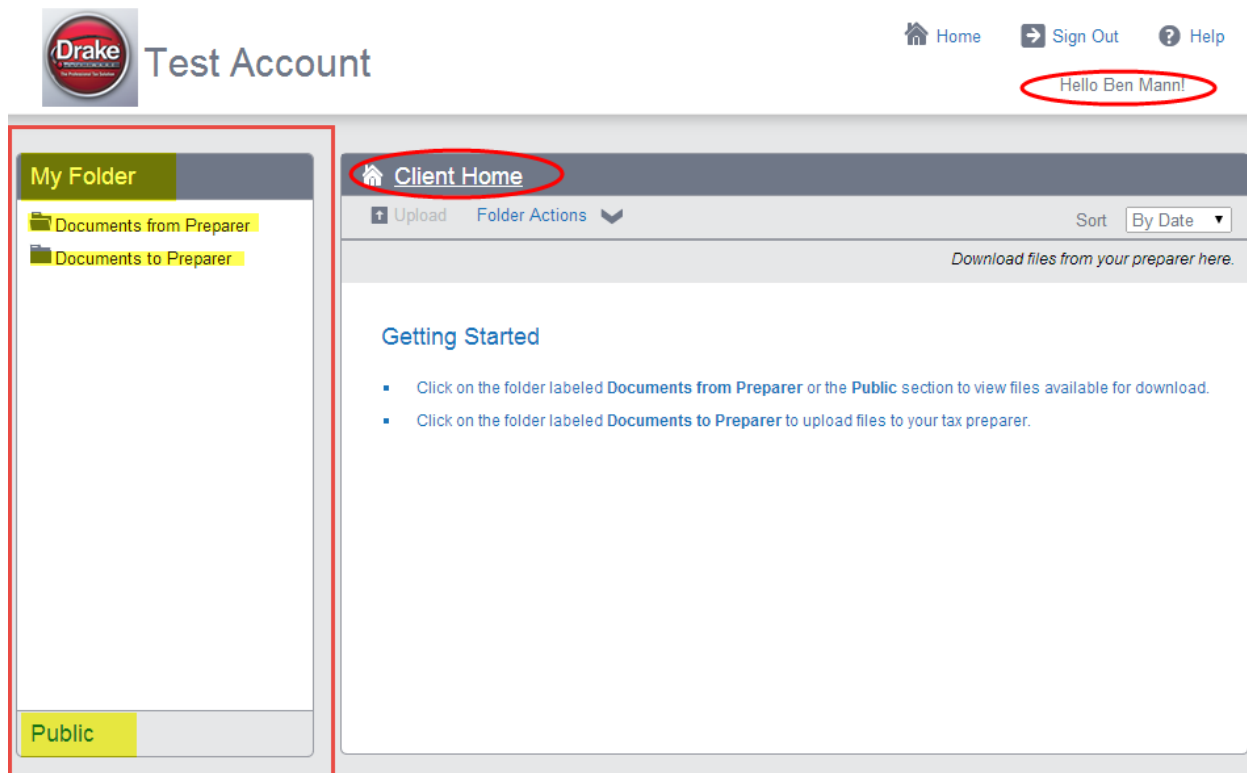


When you have successfully created a password and logged on for the first time, you will receive an email advising you that your portal set up is complete. In the email the link to the portal is included for future reference.



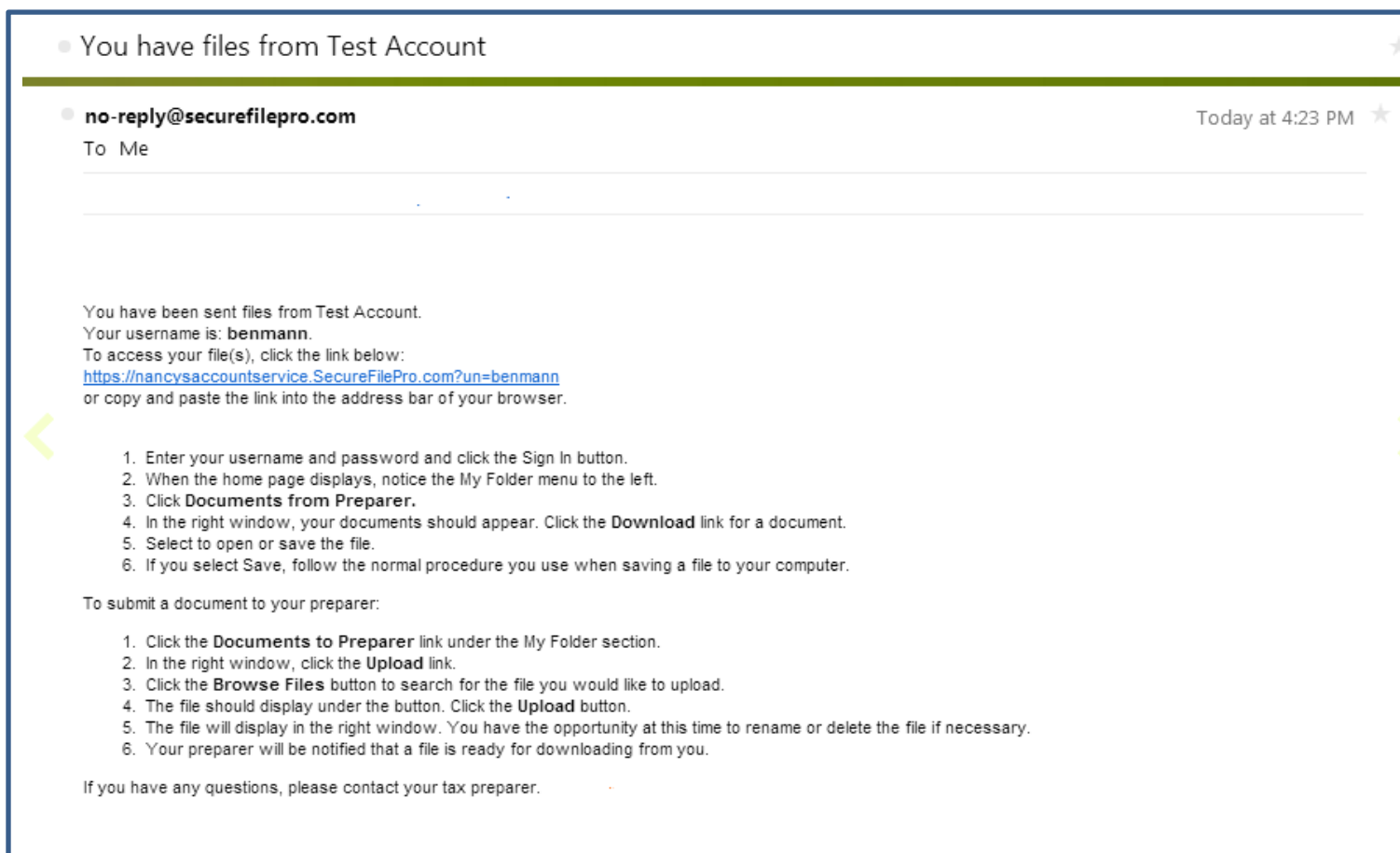
Client Home

After you login you will be on the **Client Home** screen of your portal. The panel to the left of the screen is the **Navigation Menu**. It has two sections which are **My Folder** and **Public**. The **My Folder** section is used to exchange documents between yourself and the preparer, the **Public** section is an area that your preparer may use to publish information to all of their clients. Within the **My Folder** section there are two folders, they are **Documents from Preparer** and **Documents to Preparer**.



Download Preparer Documents

When your preparer puts documents in your portal for your review you will receive an email notification. There is a link to your portal in the body of the email. The email also includes instructions that will take you through the steps to access and download the documents from the preparer as well as instructions to upload documents to send to your preparer.



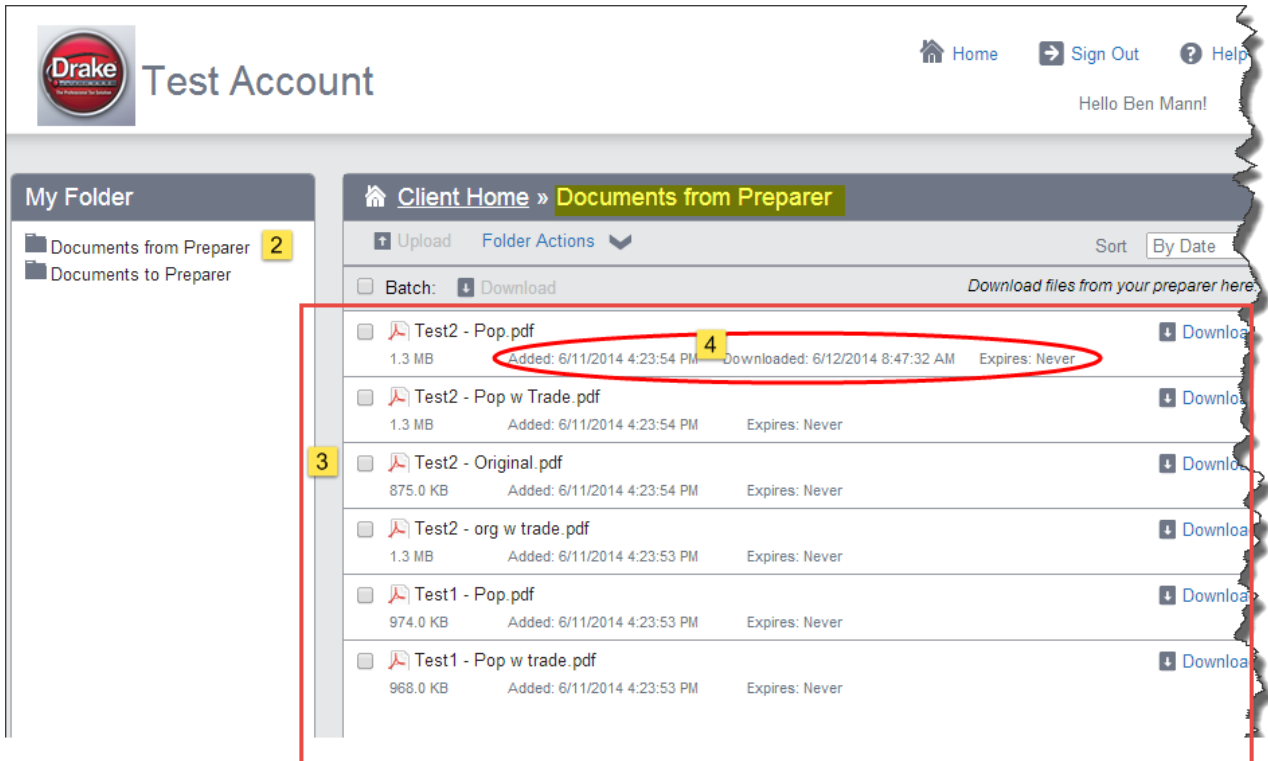
The screenshot shows an email notification with the following content:

- Subject: You have files from Test Account
- From: no-reply@securefilepro.com
- To: Me
- Received: Today at 4:23 PM
- Body: You have been sent files from Test Account. Your username is: **benmann**. To access your file(s), click the link below: <https://nancysaccountservice.SecureFilePro.com?un=benmann> or copy and paste the link into the address bar of your browser.
- Instructions for downloading documents:
 1. Enter your username and password and click the Sign In button.
 2. When the home page displays, notice the My Folder menu to the left.
 3. Click **Documents from Preparer**.
 4. In the right window, your documents should appear. Click the **Download** link for a document.
 5. Select to open or save the file.
 6. If you select Save, follow the normal procedure you use when saving a file to your computer.
- Instructions for submitting a document to your preparer:
 1. Click the **Documents to Preparer** link under the My Folder section.
 2. In the right window, click the **Upload** link.
 3. Click the **Browse Files** button to search for the file you would like to upload.
 4. The file should display under the button. Click the **Upload** button.
 5. The file will display in the right window. You have the opportunity at this time to rename or delete the file if necessary.
 6. Your preparer will be notified that a file is ready for downloading from you.
- Footer: If you have any questions, please contact your tax preparer.

Steps to Download documents from your preparer

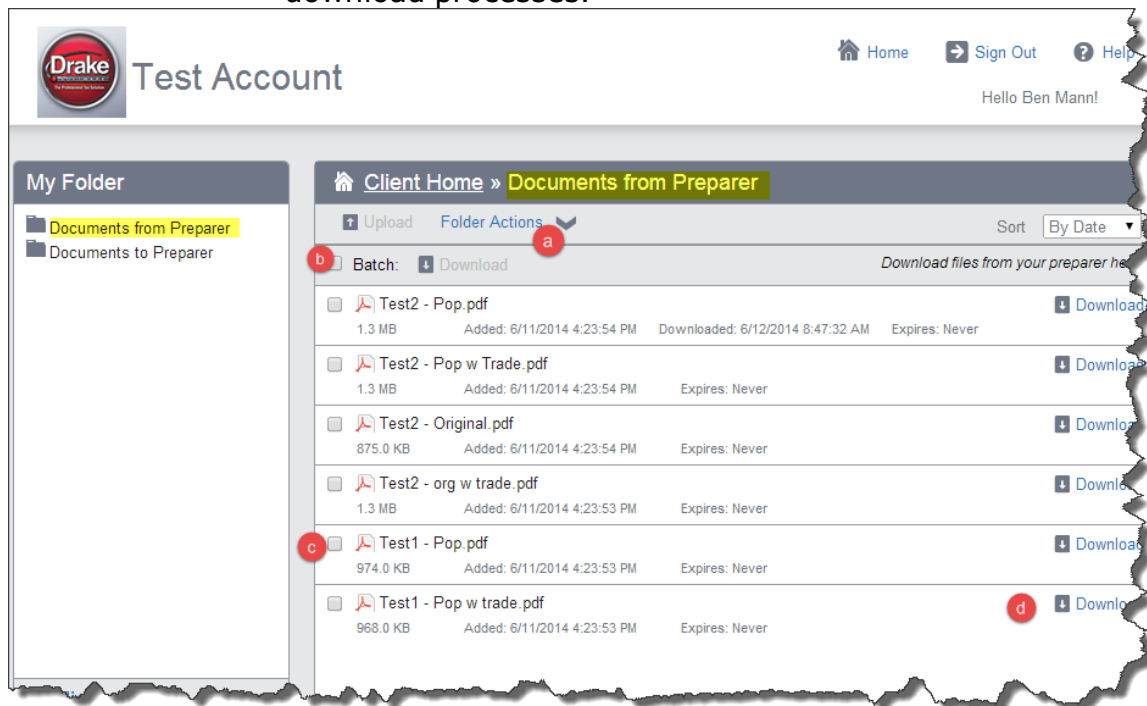
1. Log into your portal via the link in the email notification
2. **Click** on the **Documents from Preparer folder** located in the **My Folder Section** of the **Navigation menu**.
3. All documents from your preparer are listed in the main window.

4. Each document will display the date and time the preparer added it to your portal. It will also show the expiration date and the last time the document was downloaded.



5. You can download one, multiple, or all files at one time.
 - a. To download the folder:
 - Under **Folder Actions**, select **Download Folder**.
 - The program prepares a ZIP file.
 - Click **Download** and follow your browser's download processes. This will download all documents and subfolders in the **Documents from Preparer** folder.
 - b. For **All** files:
 - Click the checkbox for **Batch**.
 - Click **Download** link given as a **Batch** option.
 - The program prepares a ZIP file.
 - Click **Download** and follow your browser's download processes.
 - c. For **Multiple** files:
 - Click the checkboxes of the files you wish to download.
 - Click **Download** link on the toolbar located beside the Batch check box.
 - The program prepares a ZIP file.
 - Click **Download** and follow your browser's download processes.

- d. For a **Single** file:
- o Click the check box by the document you wish to download, then click the **Download** link located on the same line as the document you have checked then follow your browser's download processes.



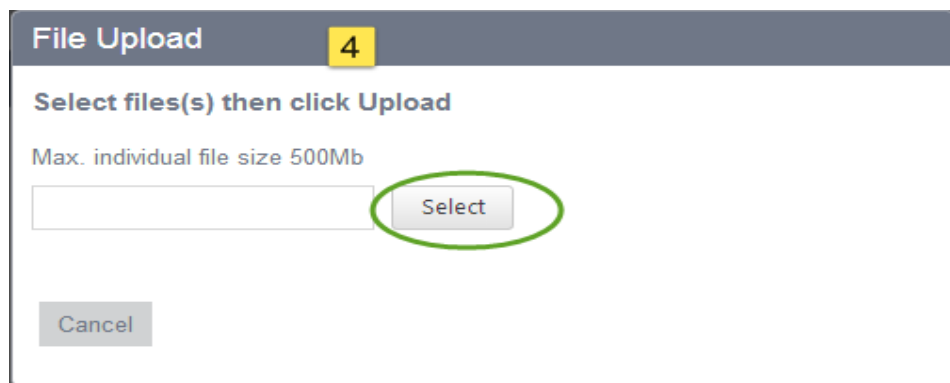
NOTE: If you cannot download the file, check your browser settings to ensure that downloads are allowed.

[Upload Documents for Preparer:](#)

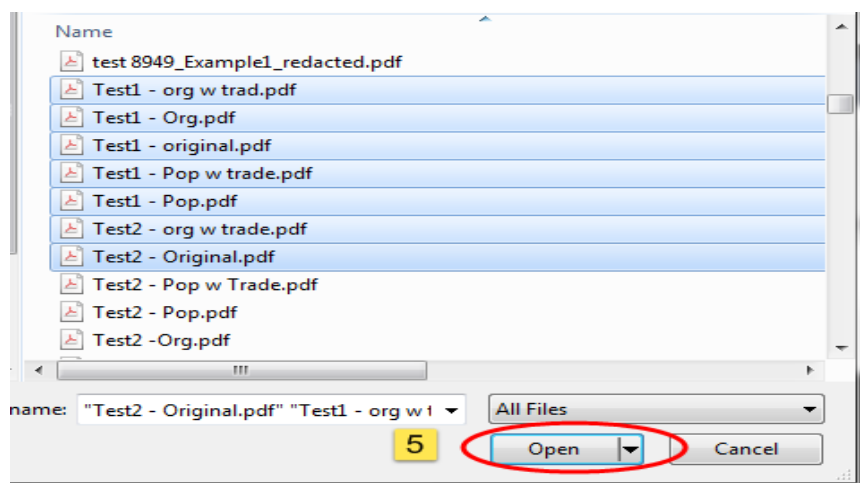
The portal provides a convenient way to send your preparer documents. When you upload a document an email notification is sent to your preparer advising them that there are documents in their folder.

Steps to Upload documents to your preparer

1. Log into your portal.
2. **Click** on the **Documents to Preparer** folder located in the **My Folder Section** of the **Navigation** menu.
3. **Click** the **Upload** button.
4. A **File Upload** popup will appear; **Click** the **Select** button, a browser will open; migrate to where the files that you wish to upload are stored.



5. Select files you wish to upload and click **Open**.



6. Files selected will be displayed; you can cancel an individual document or the entire batch of documents that are selected for upload.
7. Continue to **Select Files** for upload as needed or proceed to step 8.
8. When the files are selected, click **Upload** to upload the files to the Preparer's Folder. When the Upload button is selected the process will begin. A green dot beside the file name indicates the file is copied and ready for upload, you do have the option of removing that file.
9. A status bar will appear to show the progress of the files being uploaded.
10. When the upload is complete the files selected will be displayed.

Upload files for Preparer (continued from previous page).

File Upload

Select files(s) then click Upload

Max. individual file size 500Mb

<input checked="" type="radio"/> Test1 - org w trad.pdf	Remove	
<input checked="" type="radio"/> Test1 - Org.pdf	Remove	6
<input checked="" type="radio"/> Test1 - original.pdf	Cancel	
<input checked="" type="radio"/> Test1 - Pop w trade.pdf	Cancel	
<input checked="" type="radio"/> Test1 - Pop.pdf	Cancel	
<input checked="" type="radio"/> Test2 - org w trade.pdf	Cancel	
<input checked="" type="radio"/> Test2 - Original.pdf	Cancel	

7

6.7 MB total selected files

8

Uploaded 100.3% (0.9MB) Total 0.9MB

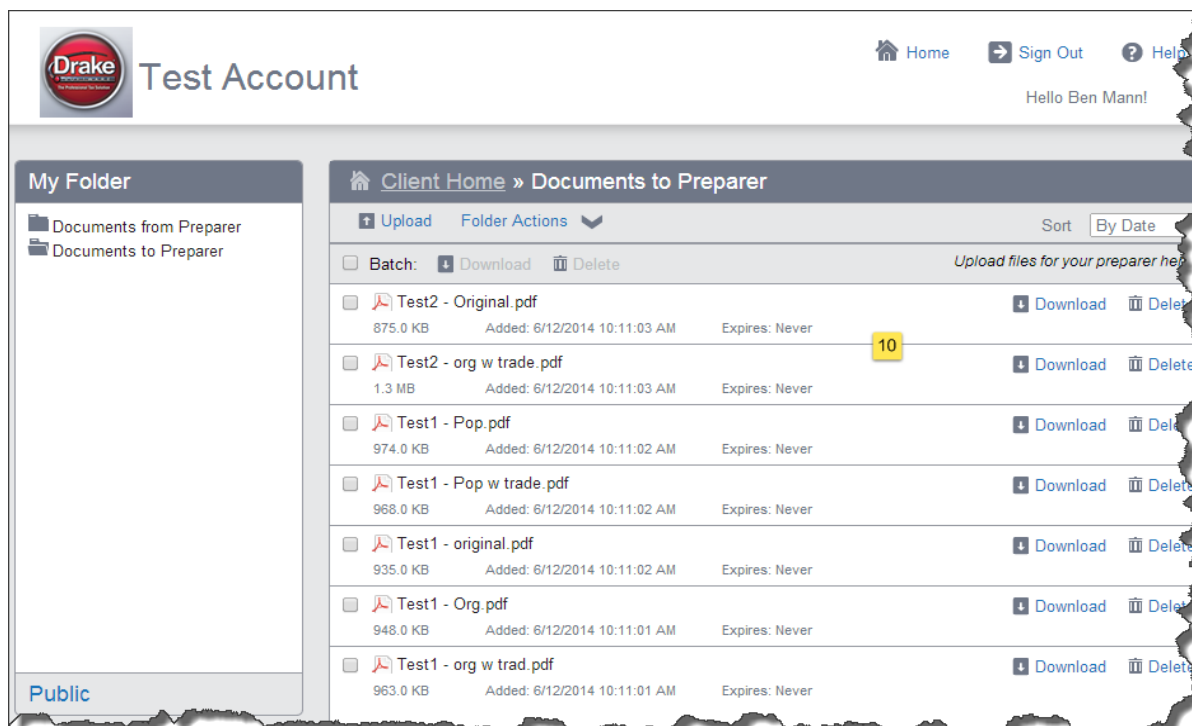
Uploaded files: 28.6% (2) Total files: 7

9

Uploading file: Test1 - Org.pdf

Elapsed time: 00:00:26s Estimated time: 00:03:08s Speed: 35.7kB/s

Upload files for Preparer (*continued from previous page*).



The screenshot shows the Drake Software interface for a 'Test Account'. The user is logged in as 'Ben Mann'. The main area displays the 'Documents to Preparer' folder, which contains a list of files. The files are as follows:

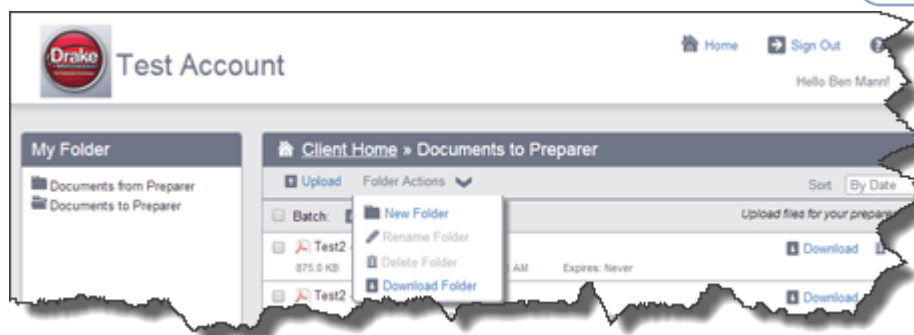
File Name	Size	Added	Expires	Actions
Test2 - Original.pdf	875.0 KB	6/12/2014 10:11:03 AM	Never	Download, Delete
Test2 - org w trade.pdf	1.3 MB	6/12/2014 10:11:03 AM	Never	Download, Delete
Test1 - Pop.pdf	974.0 KB	6/12/2014 10:11:02 AM	Never	Download, Delete
Test1 - Pop w trade.pdf	968.0 KB	6/12/2014 10:11:02 AM	Never	Download, Delete
Test1 - original.pdf	935.0 KB	6/12/2014 10:11:02 AM	Never	Download, Delete
Test1 - Org.pdf	948.0 KB	6/12/2014 10:11:01 AM	Never	Download, Delete
Test1 - org w trad.pdf	963.0 KB	6/12/2014 10:11:01 AM	Never	Download, Delete

Adding, Deleting and Renaming Folders

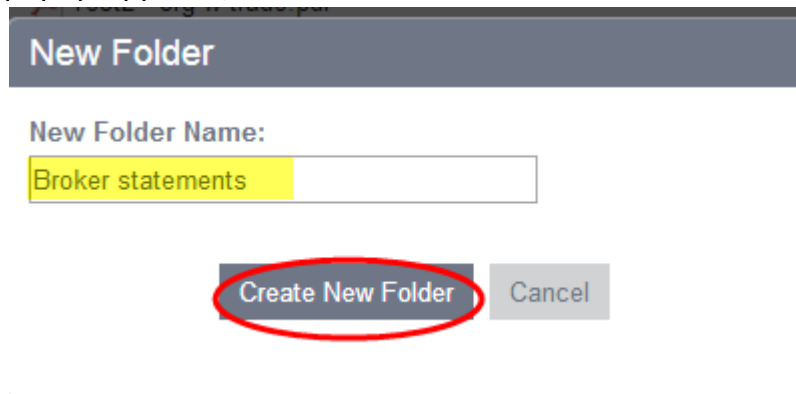
You have the ability to add subfolders to the **Documents to Preparer** folder. The folders you add can be renamed or deleted. To add, delete or rename a folder click on the **Documents to Preparer** folder on **Navigation** menu, at that time the **Folder Actions** is available.

Add a folder

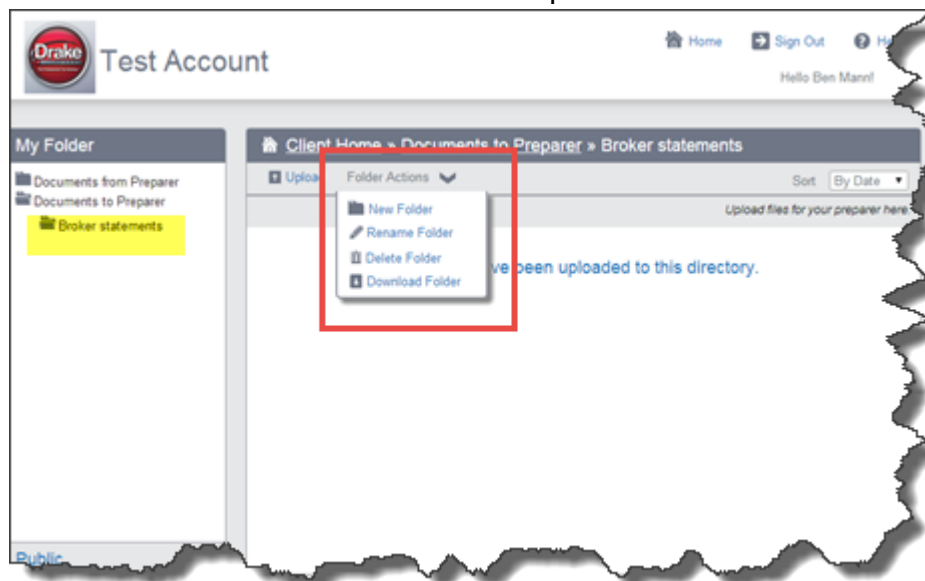
1. Click on the **Documents to Preparer** folder
2. Click **Folder Actions** and
3. Select **New folder** from the drop down.



- 4. A popup appears; enter the new folder name and click **Create New Folder**

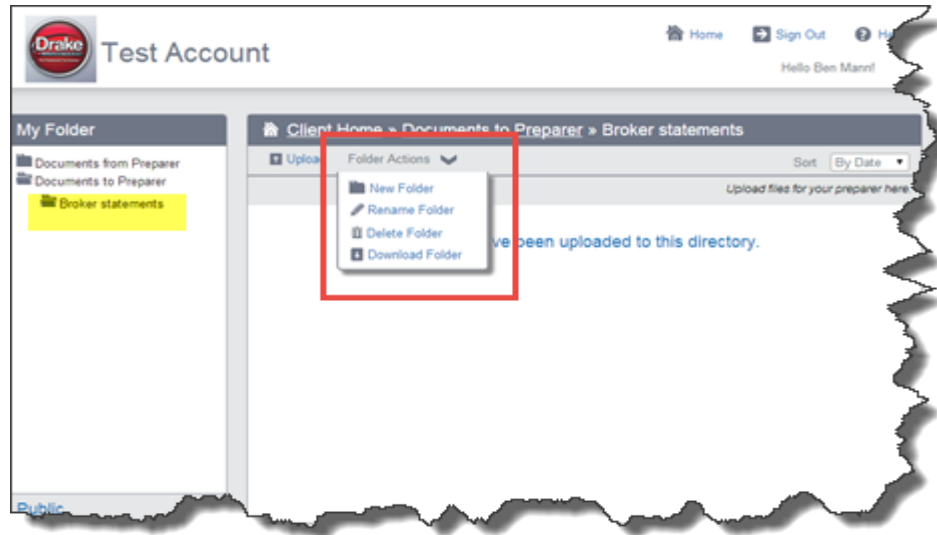


- 5. The subfolder you created is now available in your Documents to Preparer folder. All functions in the **Folder Actions** drop down are available for use.

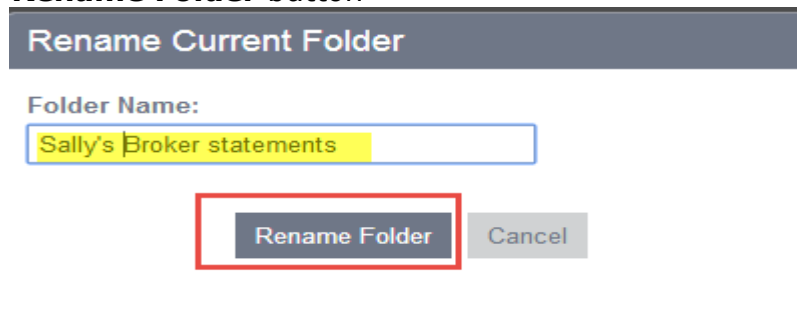


Rename Folder

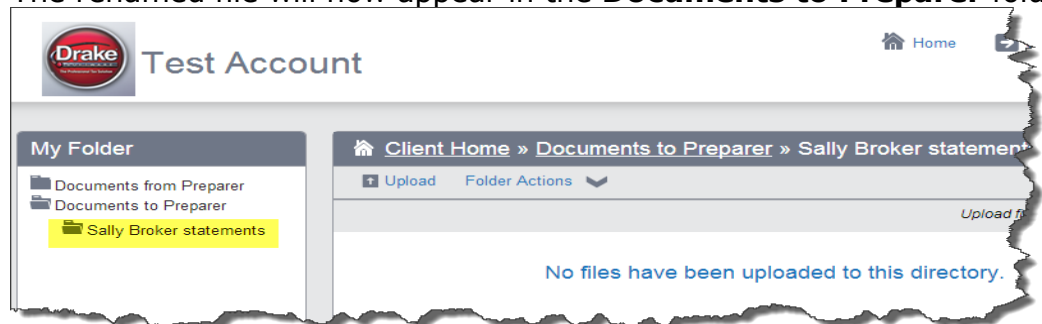
1. Click on the **Documents to Preparer** folder
2. Click on the folder you wish to rename
3. **Hover** over **Folder Actions** and click on **Rename Folder** from the drop down.



4. A window will appear, enter the replacement name of the folder and **click** the **Rename Folder** button



5. The renamed file will now appear in the **Documents to Preparer** folder.



Delete Folder

1. From the **Documents to Preparer** folder in the **Navigation** menu, open the folder you wish to delete.
2. **Hover** over **Folder Actions** and
3. Select **Delete Folder** from the drop down.
4. A warning window will appear, if you are sure you want to delete the folder **Click** the **Delete** button.



Warning: Deleted Folders and any Files in those Folders cannot be recovered