

SecureFilePro client portal

1. Goto website: joe CPA123.com
2. Click on UPLOAD DOCUMENTS
3. Portal Sign on
4. Email from securefilepro
 - a. Click on link below
5. Enter last four numbers of SSN
6. UserName (Client Name) given from securefilepro
7. Create password Upper and Lower Case; number and Special Characters (X characters)
 - a. Write down passwords for future use
8. Look at bottom of screen for PDF file Click on file to open

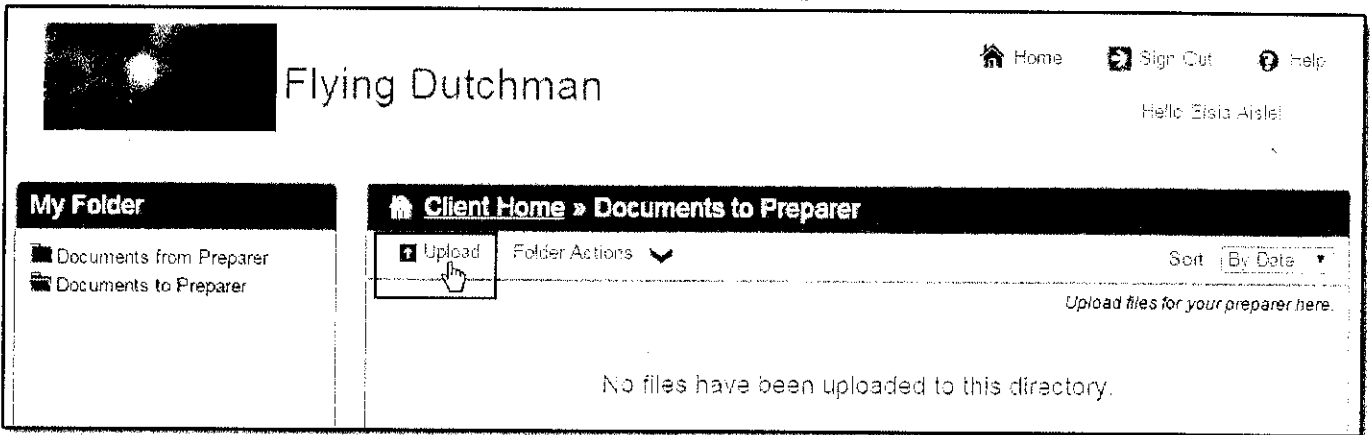
Client Upload to SecureFilePro (SFP)

How does my client upload documents to the SecureFilePro portal?

The client upload process is illustrated here with an example.

Your client, Elsia Aisle, downloaded a Form 8879 that you previously uploaded for her. She has signed it and scanned it into PDF format. She now uploads it for your retrieval.

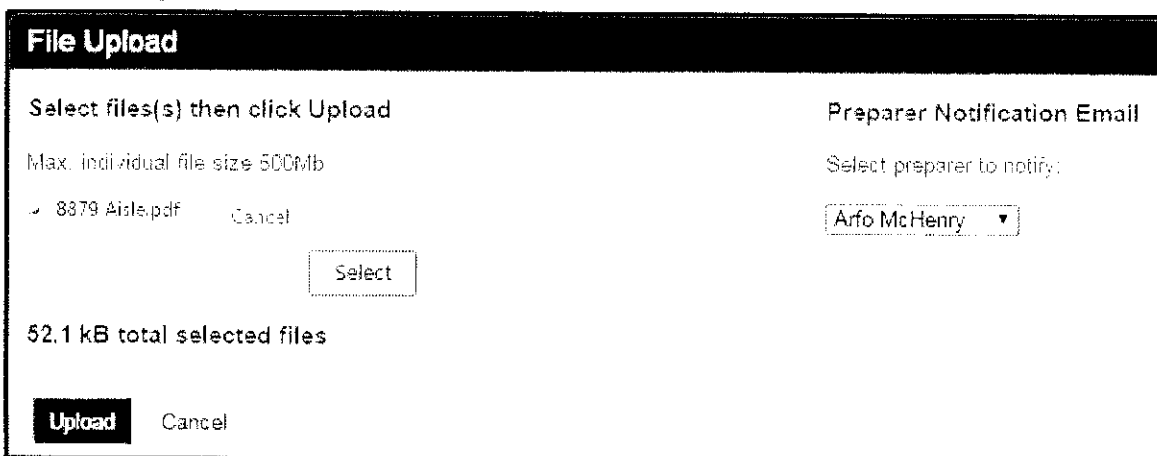
1. Elsia has already activated her portal and logs in. Her Home window is displayed in her browser. She clicks the **Documents to Preparer** link on the left and clicks **Upload** on the toolbar.



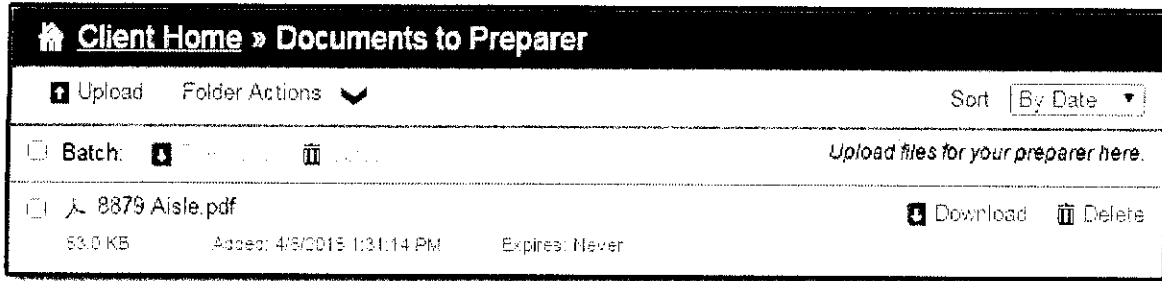
2. The **File Upload** dialog box is displayed. Elsia clicks **Select**, browses to and selects the PDF file, and clicks **Open**. She is returned to the **File Upload** dialog box where the selected file name is displayed.

If **Preparer Notification Email** is displayed, Elsia must select her preparer. See "Client Activity - Email Notification to Preparer (SFP)" in **Related Links** below.

She clicks **Upload**.



- 3. Elsia is returned to the **Documents to Preparer** list, where her file is displayed.



If you have marked the option in your own set up, you receive an email advising that Elsia has uploaded a document.

Posted 4 Years Ago by [MBroughton](#)

<http://kb.drakesoftware.com/Site/Browse/10430/Client-Upload-to-SecureFilePro-SFP>