



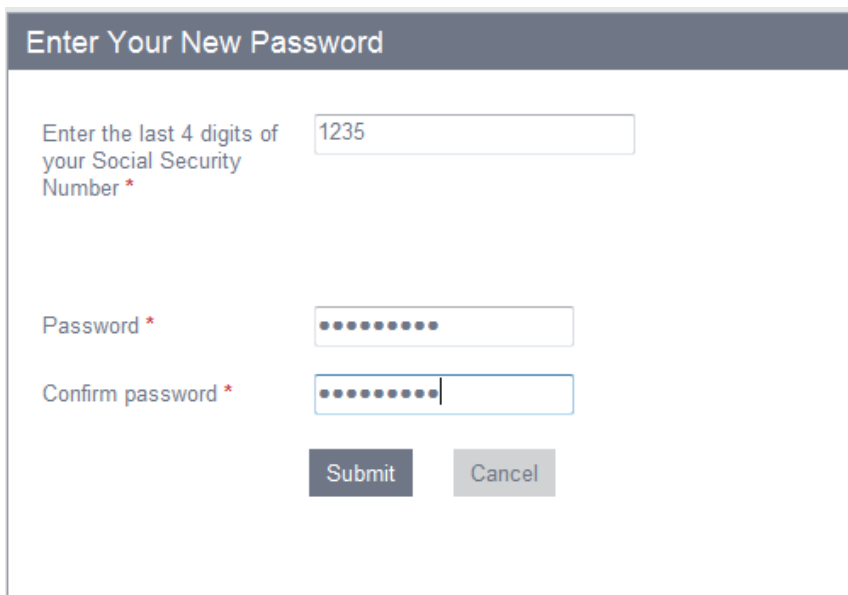
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Client Log in Instructions:

Once you receive an e-mail that your tax preparer has created a SecureFilePro™ your account, click the link and follow the steps below to complete your account set up.

1. Enter the last four of your SSN, and establish a password. The password requirements are:
 - a. Minimum 8 characters.
 - b. Contain at least one uppercase letter.
 - c. Contain at least one number.
 - d. Contain at least one special character.
 - e. Cannot contain spaces.



The screenshot shows a web form titled "Enter Your New Password". It contains three input fields: "Enter the last 4 digits of your Social Security Number *" with the value "1235", "Password *" with 8 dots, and "Confirm password *" with 8 dots. Below the fields are "Submit" and "Cancel" buttons.

2. Once this is done, you will be able to log in to the site using your assigned username and the password you created. Make sure you are on the Client Sign In before entering your information.

Sign In

Username:

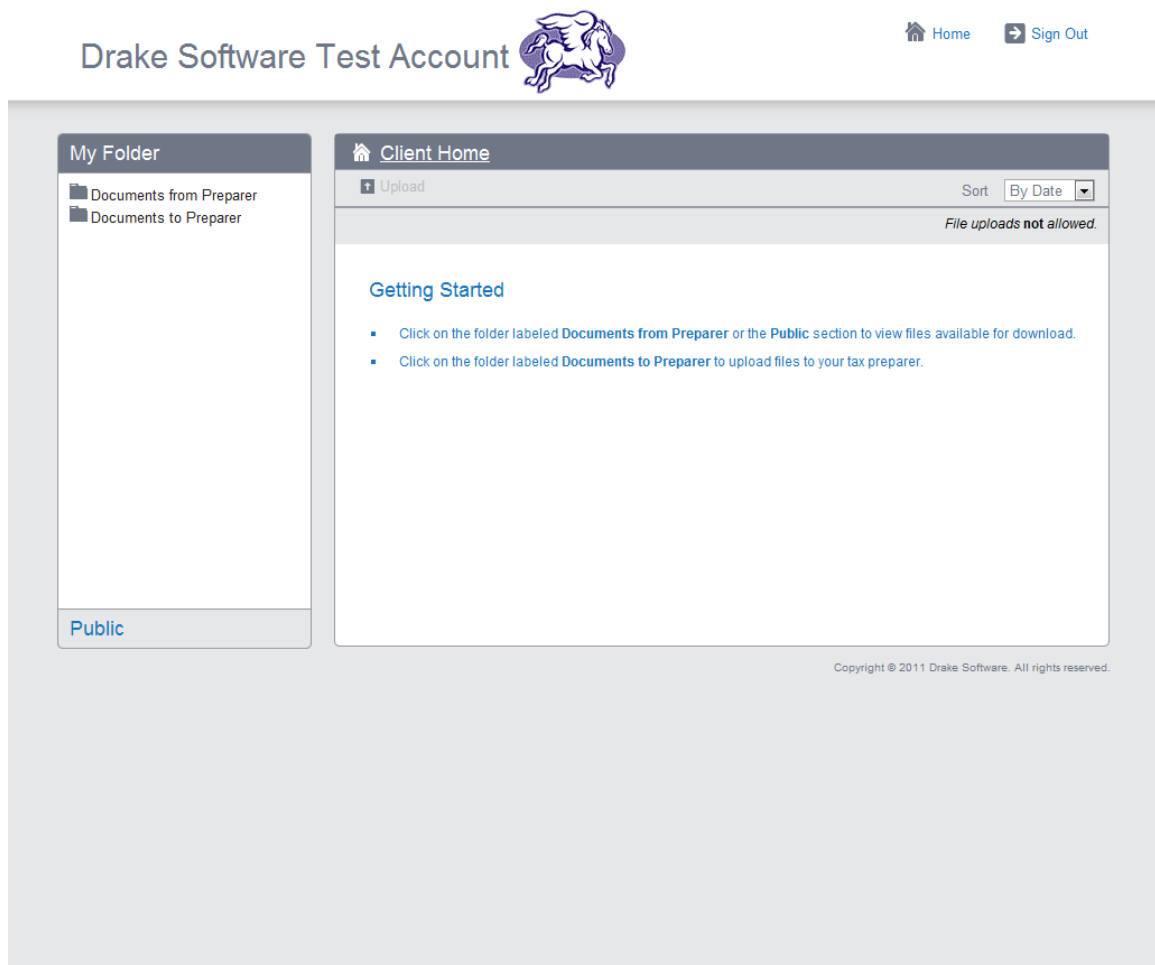
Password:

[Forgot username or password?](#)

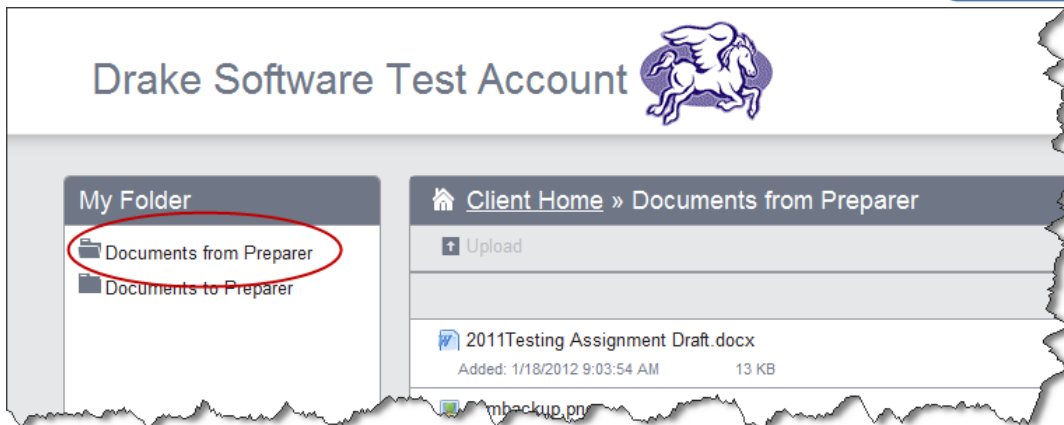
Upload/Download Files:

Files From Preparer:

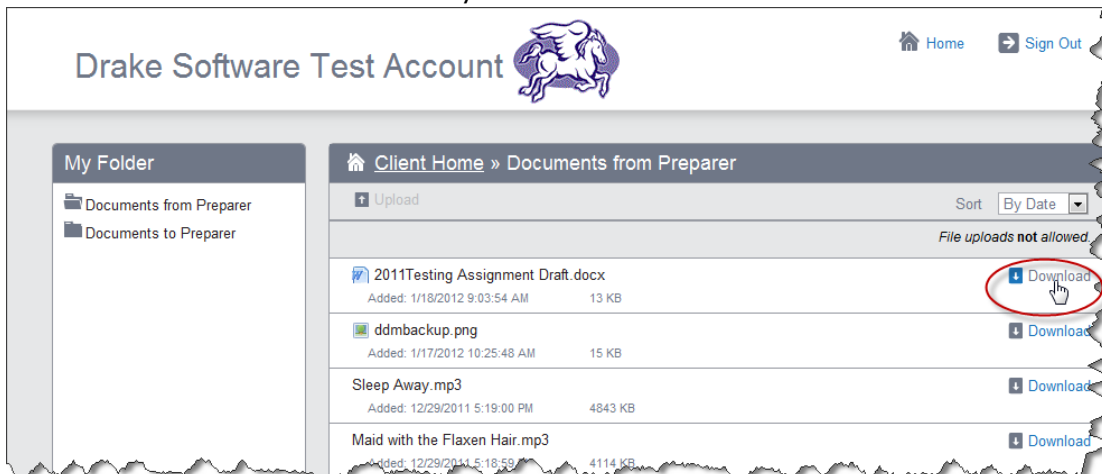
After you log in you will be taken to the Client Home page of your tax preparer's site. Follow the instructions below to download your files.



1. Click **Documents from Preparer**.

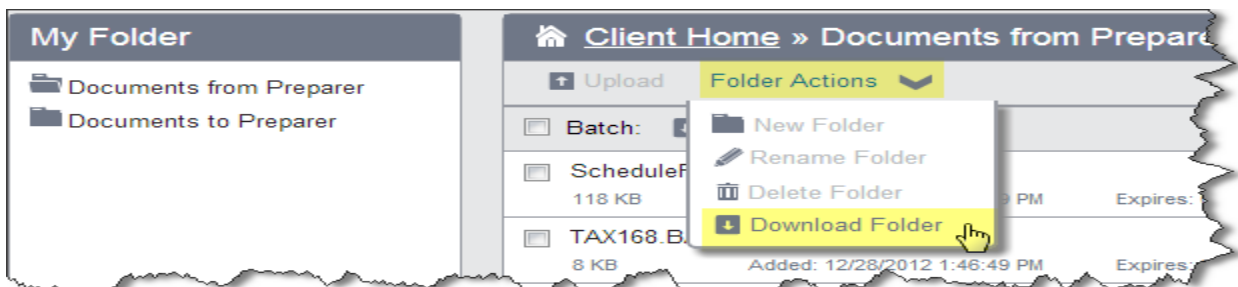


2. Click **Download** beside to the file you want to retrieve.

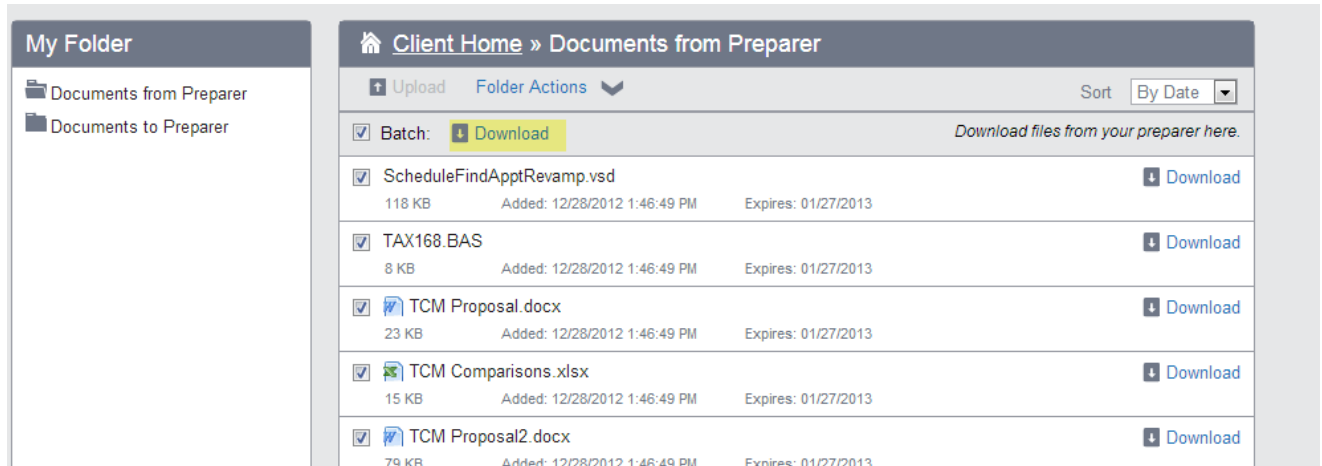


NOTE: You can download multiple files at a time.

- 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.



- 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.



The screenshot displays the 'My Folder' view in SecureFilePro. The main area shows the 'Client Home » Documents from Preparer' folder. A 'Batch' download option is highlighted, and several files are selected with checkboxes. The files listed are:

File Name	Size	Added	Expires	Action
ScheduleFindApptRevamp.vsd	118 KB	12/28/2012 1:46:49 PM	01/27/2013	Download
TAX168.BAS	8 KB	12/28/2012 1:46:49 PM	01/27/2013	Download
TCM Proposal.docx	23 KB	12/28/2012 1:46:49 PM	01/27/2013	Download
TCM Comparisons.xlsx	15 KB	12/28/2012 1:46:49 PM	01/27/2013	Download
TCM Proposal2.docx	79 KB	12/28/2012 1:46:49 PM	01/27/2013	Download

- c. For multiple files:
- Click the checkboxes of the files you wish to download.
 - Click **Download** link given as a **Batch** option.
 - The program prepares a ZIP file.
 - Click **Download** and follow your browser's download processes.

My Folder

- Documents from Preparer
- Documents to Preparer

Public

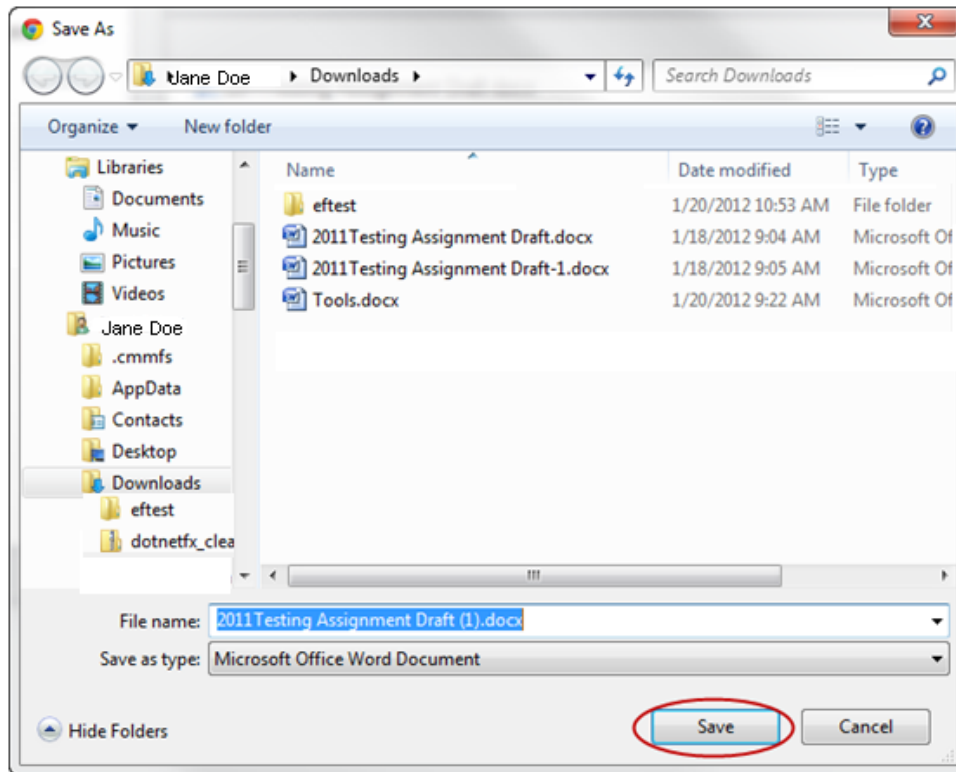
Client Home » Documents from Preparer

Upload Folder Actions Sort By Date

Batch: Download **Only selected files are downloaded.** Download files from your preparer here.

<input checked="" type="checkbox"/>	ScheduleFindApptRevamp.vsd	118 KB	Added: 12/28/2012 1:46:49 PM	Expires: 01/27/2013	Download
<input checked="" type="checkbox"/>	TAX168.BAS	8 KB	Added: 12/28/2012 1:46:49 PM	Expires: 01/27/2013	Download
<input type="checkbox"/>	TCM Proposal.docx	23 KB	Added: 12/28/2012 1:46:49 PM	Expires: 01/27/2013	Download
<input checked="" type="checkbox"/>	TCM Comparisons.xlsx	15 KB	Added: 12/28/2012 1:46:49 PM	Expires: 01/27/2013	Download
<input checked="" type="checkbox"/>	TCM Proposal2.docx	79 KB	Added: 12/28/2012 1:46:49 PM	Expires: 01/27/2013	Download
<input checked="" type="checkbox"/>	Doc Mgt - ShariReview.docx	14 KB	Added: 12/28/2012 1:46:49 PM	Expires: 01/27/2013	Download
<input type="checkbox"/>	08162012 SchMeeting.docx	76 KB	Added: 12/28/2012 1:46:49 PM	Expires: 01/27/2013	Download
<input type="checkbox"/>	PCL5eSupportLists.xlsx	18 KB	Added: 12/28/2012 1:46:49 PM	Expires: 01/27/2013	Download
<input checked="" type="checkbox"/>	Seapine_Drake TCM N.pdf	53 KB	Added: 12/28/2012 1:46:49 PM	Expires: 01/27/2013	Download

3. For all downloads follow the on-screen instructions for your specific browser.

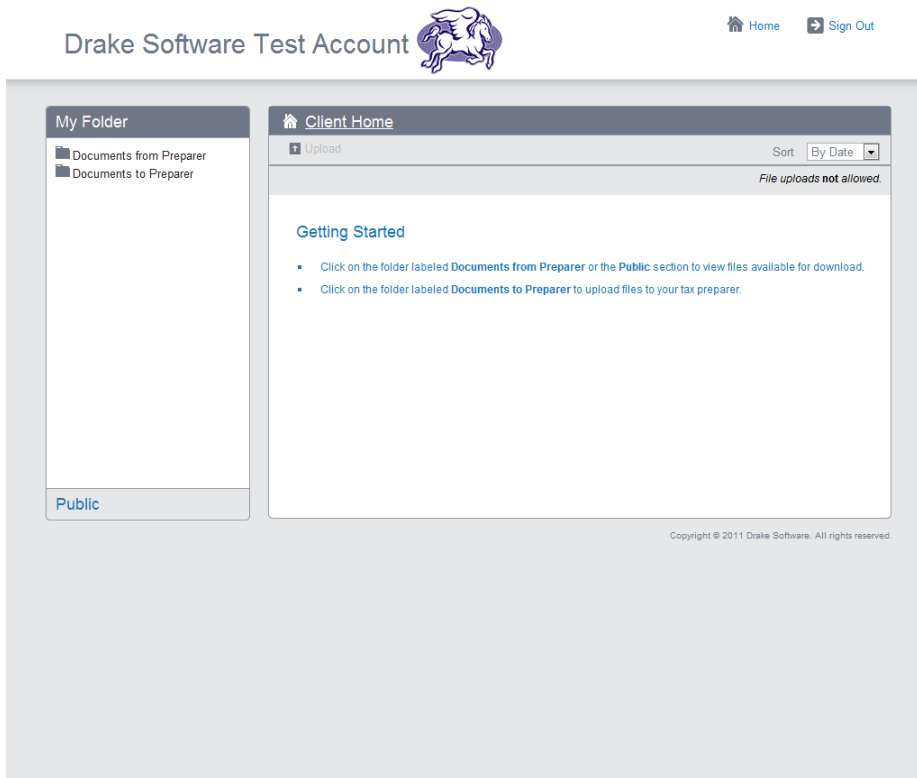


NOTE: If you cannot download the file, check your browser settings to ensure that downloads are allowed.

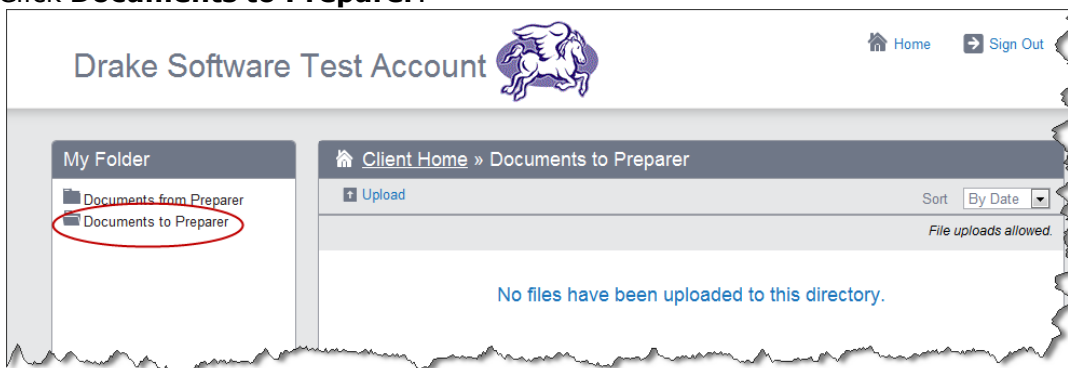
4. Once the file(s) are downloaded to your preferred location, you can view them as needed using your browser's view downloads or Windows Explorer.

Files to Preparer:

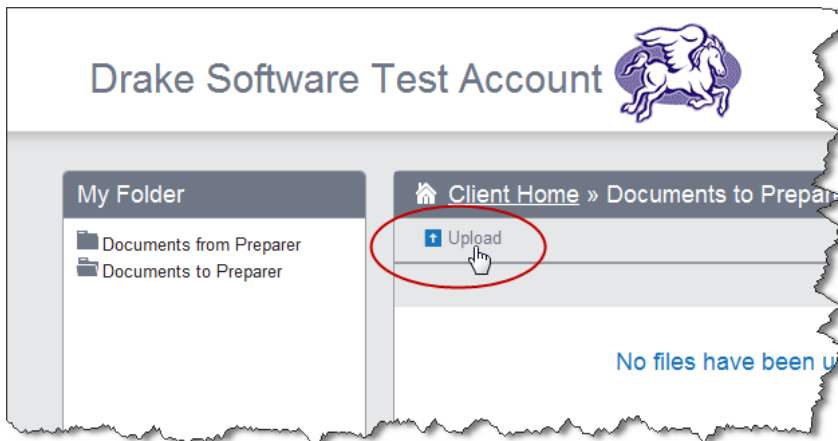
You can Download Files to Preparer by following the instructions below:



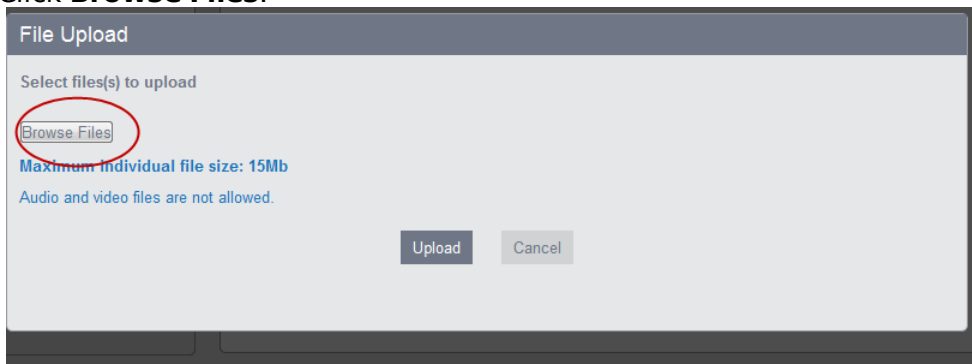
1. Click **Documents to Preparer**.



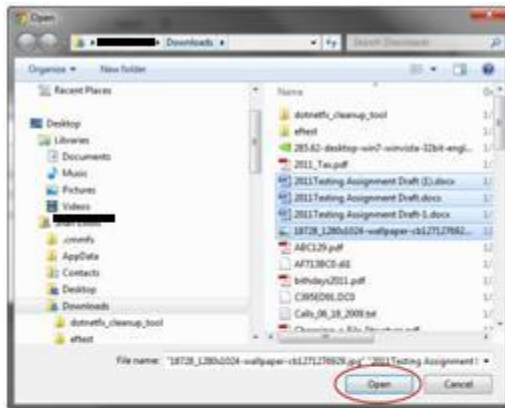
2. Click **Upload**.



3. Click **Browse Files**.




4. Use the browser to locate and select a file to upload and click **Open**.



NOTE: You can select multiple files to upload at one time.

5. Click **Upload** to add the selected files to the Documents to Preparer folder.

Drake Software Test Account  [Home](#) [Sign Out](#)

My Folder






- Documents from Preparer
- Documents to Preparer

Public

Client Home » Documents to Preparer

[Upload](#) Sort By Date

Batch: Delete File uploads allowed.

 18728_1280x1024-wallpaper-cb1271276929.jpg	Download Rename Delete
<small>Added: 1/25/2012 1:31:43 PM 1209 KB</small>	
 2011Testing Assignment Draft-1.docx	Download Rename Delete
<small>Added: 1/25/2012 1:31:43 PM 13 KB</small>	
 2011Testing Assignment Draft.docx	Download Rename Delete
<small>Added: 1/25/2012 1:31:43 PM 13 KB</small>	
 2011Testing Assignment Draft (1).docx	Download Rename Delete
<small>Added: 1/25/2012 1:31:42 PM 13 KB</small>	
 ABC129.pdf	Download Rename Delete
<small>Added: 1/25/2012 1:24:09 PM 32 KB</small>	

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