

Portal Quick Start Guide

We use SecureFilePro powered by Drake software as the safe and easy way to upload and download documents.

1. Upon portal setup, you will receive an email link that you must use in the first 48 hours. If the link expires, call our office to resend it to you. If you did not receive the link, check your junk mail. If you still do not receive your link, we can resend it. Follow the link to create a password. See email sample below.

From: no-reply@securefilepro.com [mailto:no-reply@securefilepro.com]
Sent: Thursday, January 11, 2018 10:34 AM
To: Tax Data
Subject: You have a new Associates in Accounting, CPA portal

A portal has been created for you by **Associates in Accounting, CPA**. Your username is: **TaxData**

To access your file(s), click the link below:

<https://associatesinaccountingcpa.securefilepro.com?link=k7zthi3z2hntvyys1p5jowprx35etop>

or copy and paste the link into the address bar of your browser. **THIS LINK WILL EXPIRE IN 48 HOURS.**

Important Instructions

1. When the next window appears, please enter the last four digits of the SSN or EIN, or PIN issued by sender.
2. Create a password for your account. The password must contain an upper case letter, a lower case letter, a number, and a special character (such as !, #, \$, etc.).
3. Click the Submit button. The Sign In screen displays.
4. Enter your username and password and click the Sign In button.
5. When the home page displays, notice the My Folder menu to the left.
6. Click **Documents from Preparer**.
7. In the right window, your documents should appear. Click the **Download** link for a document.
8. Select to open or save the file.
9. If you select Save, follow the normal procedure you use when saving a file to your computer.

To submit 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 **Select** 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.

If you have any questions, please contact your tax preparer.

2. In the future you can access the portal from our website AssociatesInAccountingCPA.com. On our website click the black box that says Client Portal. See Portal Sign In page below.

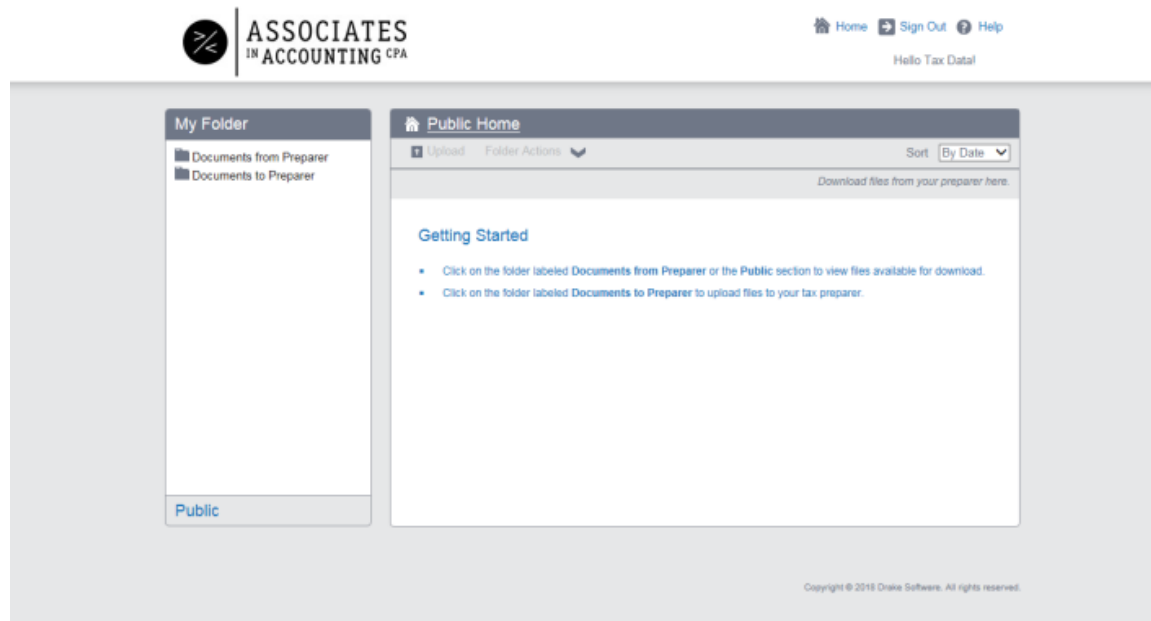


The screenshot shows a web form titled "Portal Sign In". It contains two input fields: "Username:" and "Password:". Below the fields is a "Submit" button. At the bottom of the form, there is a link that says "Forgot username or password?". Below the form, there is a copyright notice: "Copyright © 2018 Drake Software. All rights reserved."

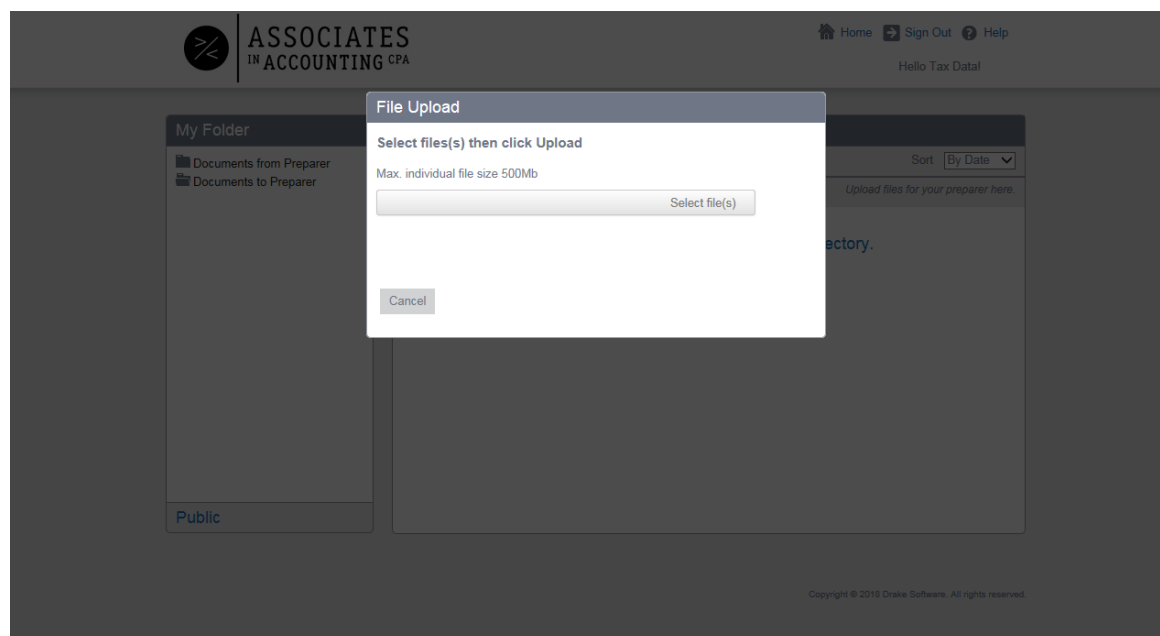
3. If you forget your password, please click on **Forgot username or password** to reset. We do not have access to your password.

Uploading Documents

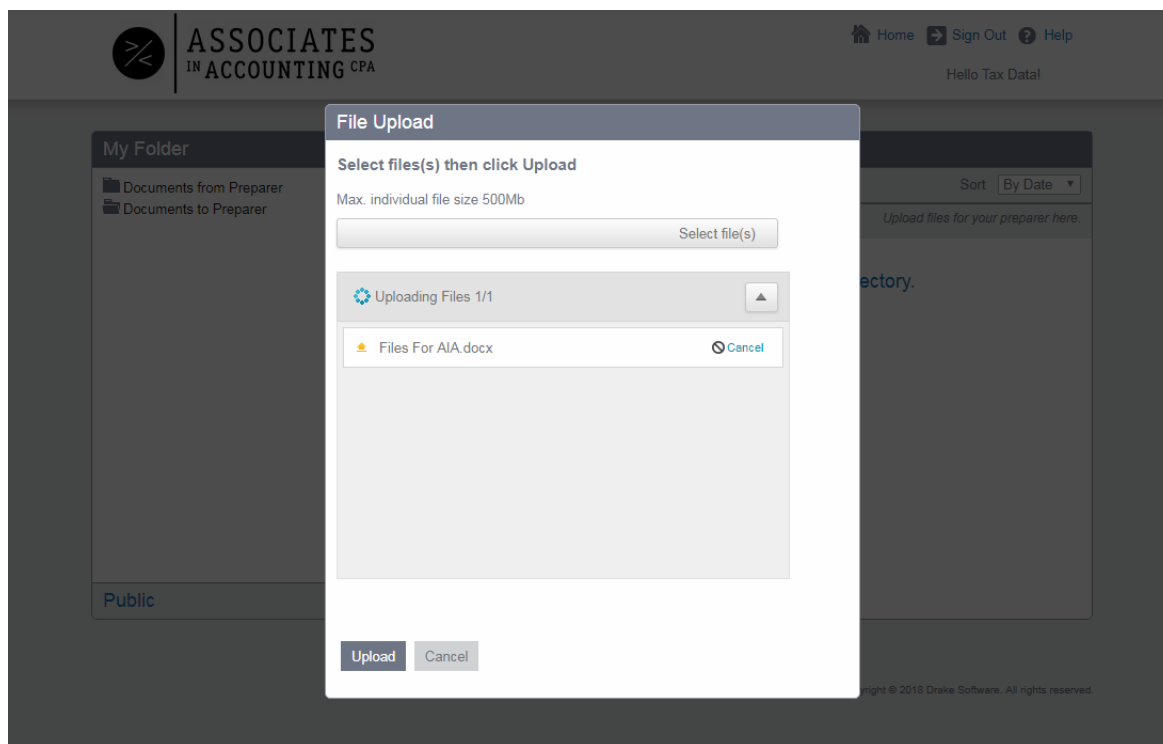
1. Click the Documents to Preparer file on the left. Then click Upload underneath Public Home.



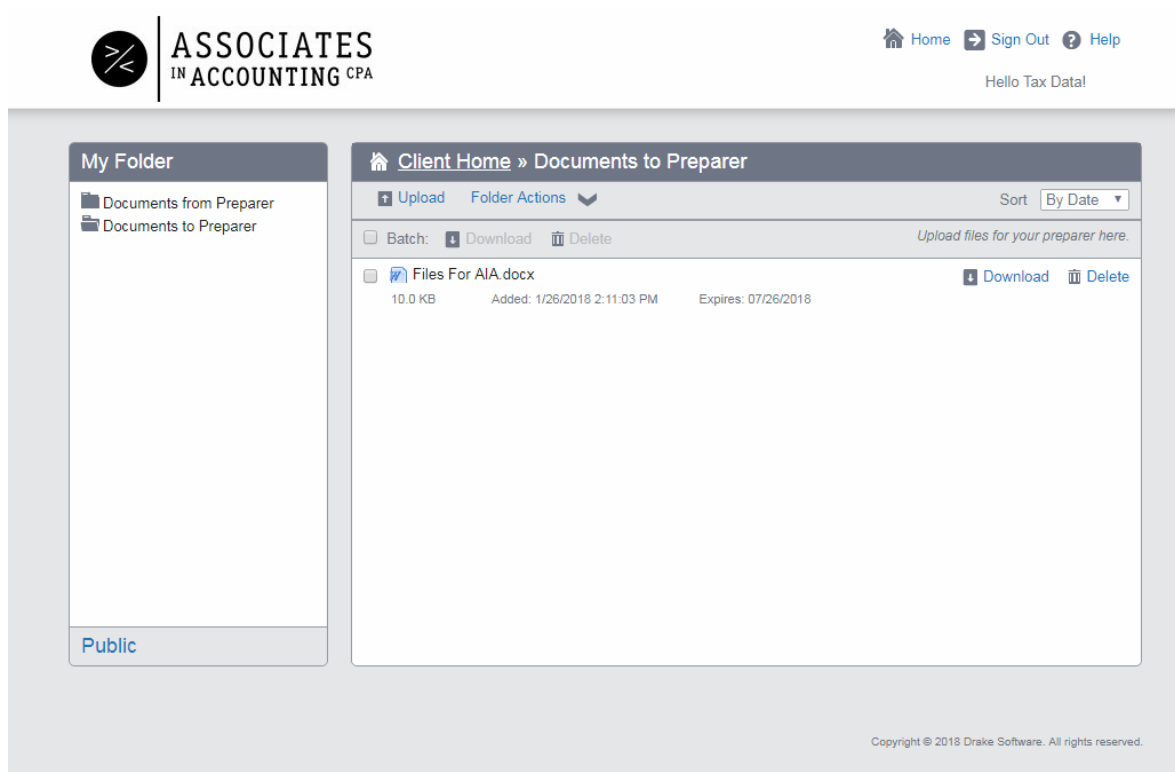
2. A File Upload box will appear which allows you to upload documents from your computer.



- Once you have selected a file, click Upload in the bottom left of the box.

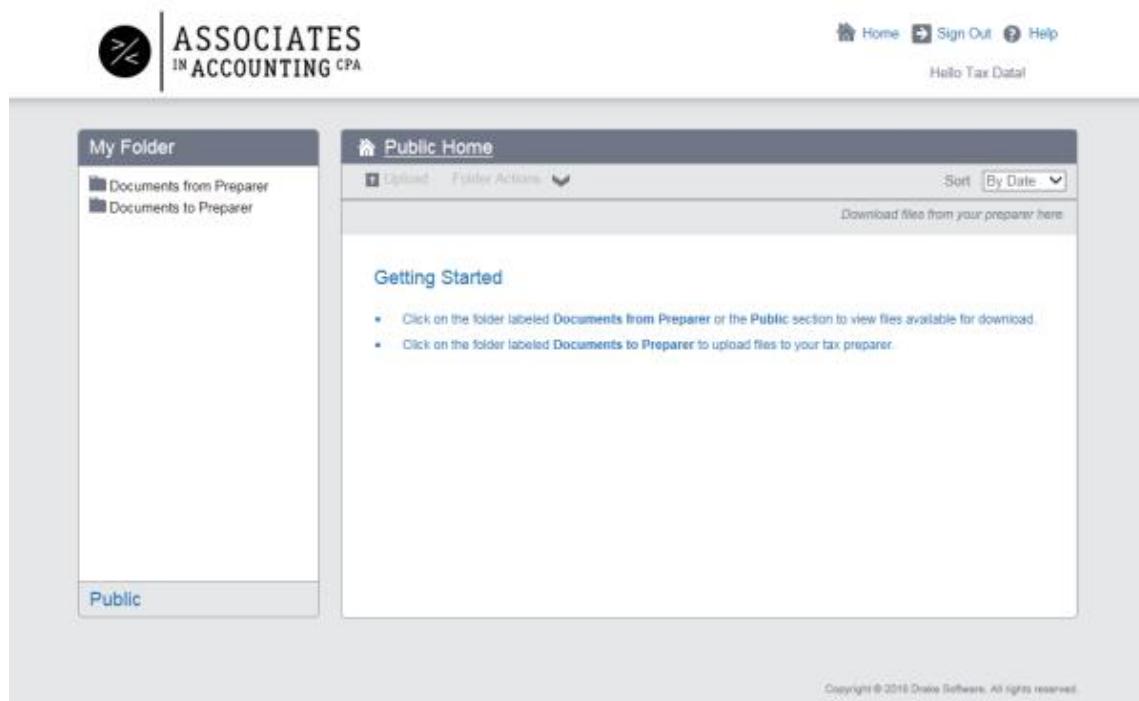


- Once upload is complete, you can see your uploaded files in the Documents to Preparer folder. Our office automatically receives an email notification after files are uploaded. You do not need to notify us.

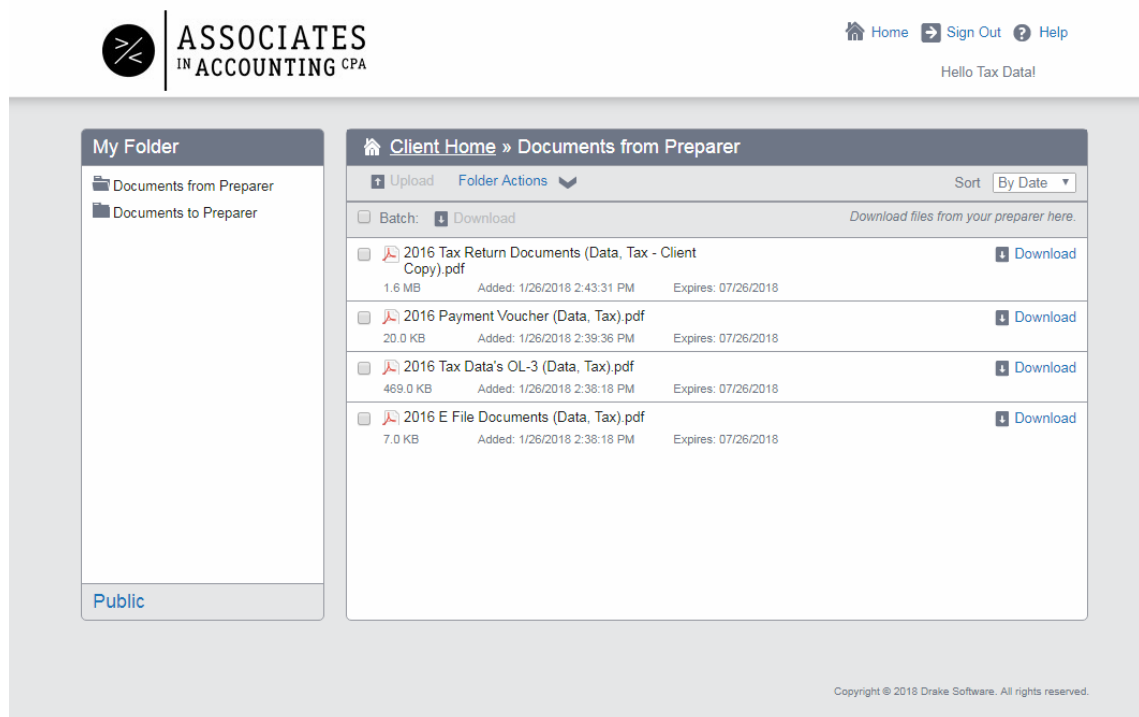


Downloading Documents

1. Click the Documents from Preparer file on the left.



2. You will see documents that have been uploaded by AIA. First download the document with Client Copy in the title. To download the file, click the blue Download link to the right of the document name. If the document does not open automatically, check your downloads file on your computer.



3. In the first couple of pages of the Client Copy document is a client letter. This letter explains the work we have done for you and any further action required by you. All documents expire out of your portal 6 months after the added date. Please download documents in a timely manner.