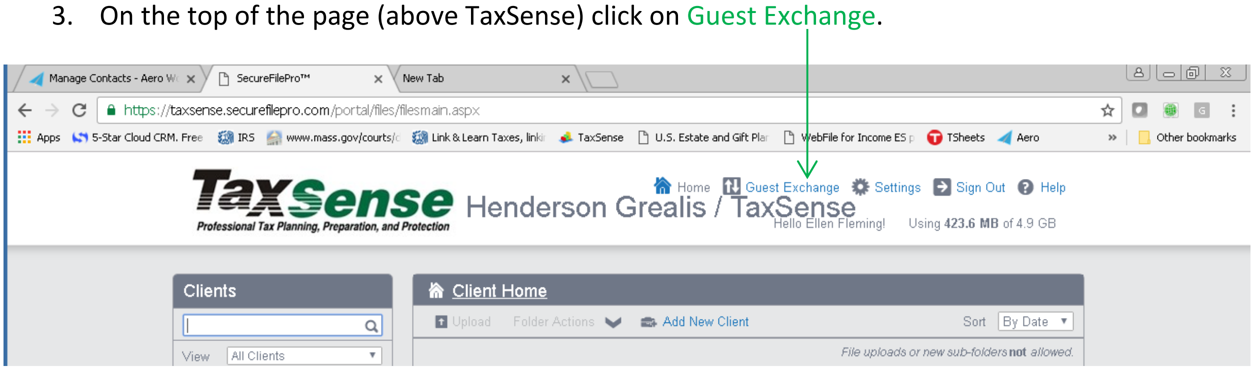
SecureFilePro Instructions

Log-In

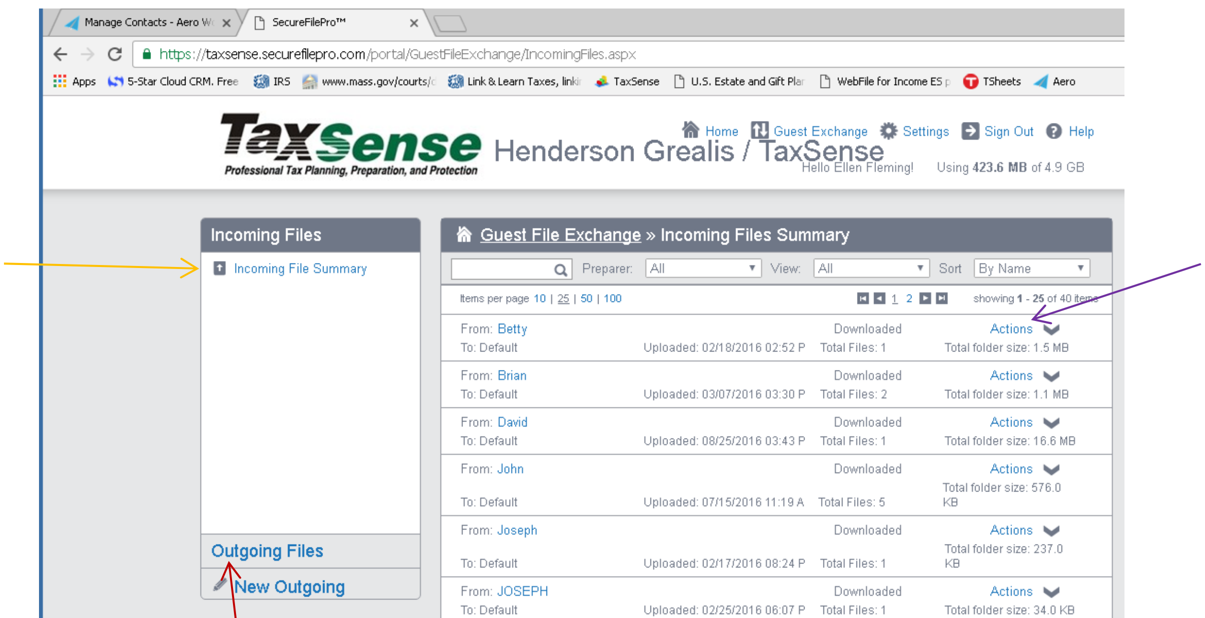
1. Go to taxsense.securefilepro.com in any browser
2. Type in your username and password

Retrieve Client Files

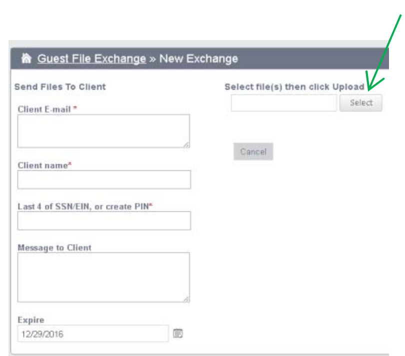
3. On the top of the page (above TaxSense) click on Guest Exchange.



4. To see the list of incoming client files – Click on Incoming File Summary
5. Find the client's name (alphabetically by FIRST name) and check status, either new or downloaded (if status is downloaded, check DDM).
6. Click on Actions, then download to access file(s). Save to client's DDM folder.



Send Client Files



7. Click on Outgoing Files, then New Outgoing.
   a. Add client e-mail (type or copy from Aero/Solve)
   b. Type name, PIN (last 4 digits of SSN) and message
   c. Click on Select to browse for file to send
   d. Click on file and then open to attach
   e. Repeat c & d for multiple files
   f. Click Upload when ready to send files
      (box will appear when file is attached)