

SecureFilePro Account Setup Instructions



Hello Sample Client,

A new SecureFilePro account has been created for you by Byerly & Associates, CPA

Your username is: ClientSample

To create your password and access your account, follow the link below.

<https://byerlycpa.securefilepro.com/connect>

If clicking the link doesn't work, you can copy and paste it into your browser's address bar.

We have begun preparing for a new tax season! We are excited about introducing a new touchless process for your convenience and safety. This includes the use of a portal to gather and deliver your tax return documents and an online tax organizer.

To get started:

1. Use the link and instructions above to access your SecureFilePro account. This is your personal secure portal.
2. Upload your tax documents to the portal.
3. Complete the online tax organizer found at <https://www.cognitofirms.com/ByerlyAssociates/2020taxorganizerforindividuals>
4. We will upload your tax return to the portal once complete. You will be able to sign the signature documents and pay through the portal as well.

For more information and step-by-step instructions, visit our website at www.byerlycpa.com.

We are requiring **EVERY** client to complete this organizer in order for us to prepare your tax return. If you need assistance, we are happy for you to schedule a time to visit our office where we can help you. Not everything in the organizer will apply to you, but we ask that you complete all applicable sections before submitting the organizer.

If needed, you can still bring documents to the office that cannot be scanned and saved in the portal. If you prefer to bring in your documents as in years past, we are also available here at our new office. Either way, we hope to make your experience easy and efficient.

As always, you are welcome to contact our office for any assistance or questions.

We look forward to serving you this year!

Sincerely,

Richard Byerly

Please Note: as of December 18, 2020, we have moved 1/2 mile north to a **NEW OFFICE LOCATION:**

730 North Dean Road, Suite 300, Auburn, AL 36830

Phone: 334-741-1040

Email: info@byerlycpa.com

1. Open your email inbox and locate the email you received from our Byerly & Associates office. The email should look like the sample above.

byerlycpa.securefilepro.com/connect/#/createaccount

byerly & associates

Files

✓ CheckList

✎ Sign Forms

💰 Payment

Create Password for ClientSample

Last 4 digits of SSN *

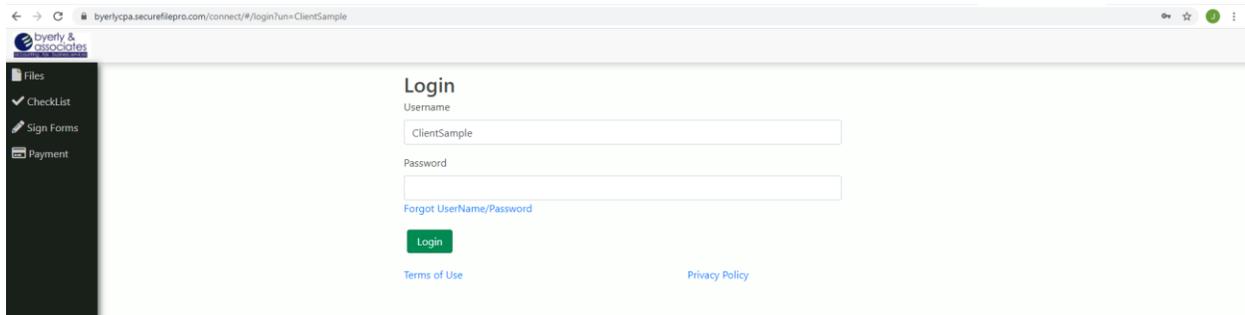
Password *

Confirm Password *

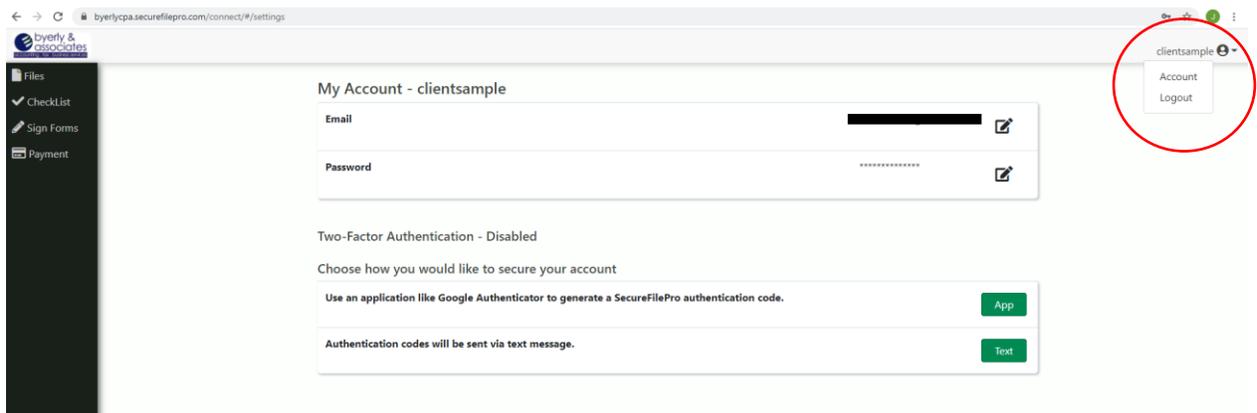
Minimum 8 Characters

Submit Cancel

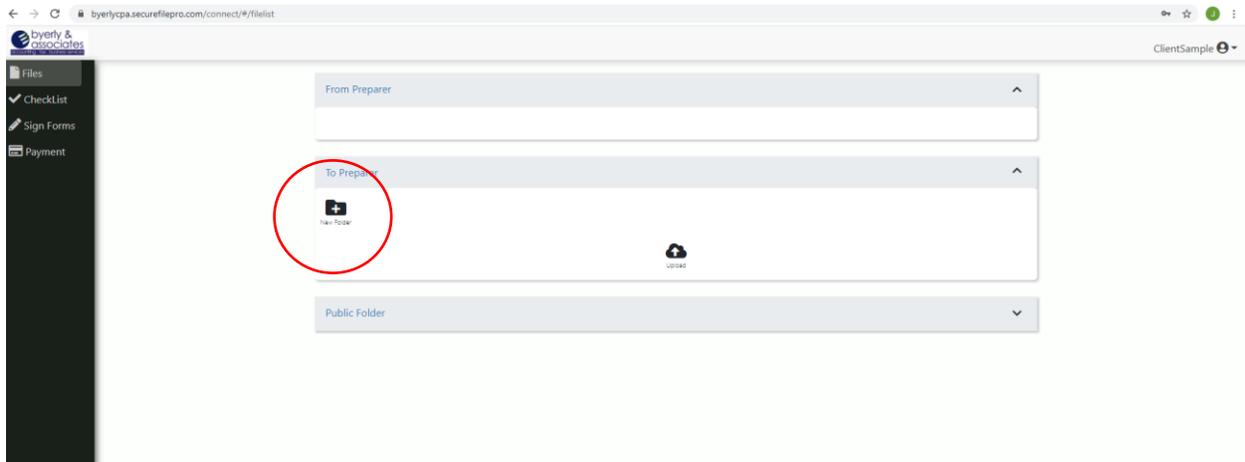
2. Follow the SecureFilePro link in the email to open the login page for your SecureFilePro account. Enter the last four digits of your SSN and create a password for your secure portal.



3. Once you have created your account password, return to the SecureFilePro account login page. Enter your username provided in the Byerly & Associates email and the password you created. Log into your portal account.

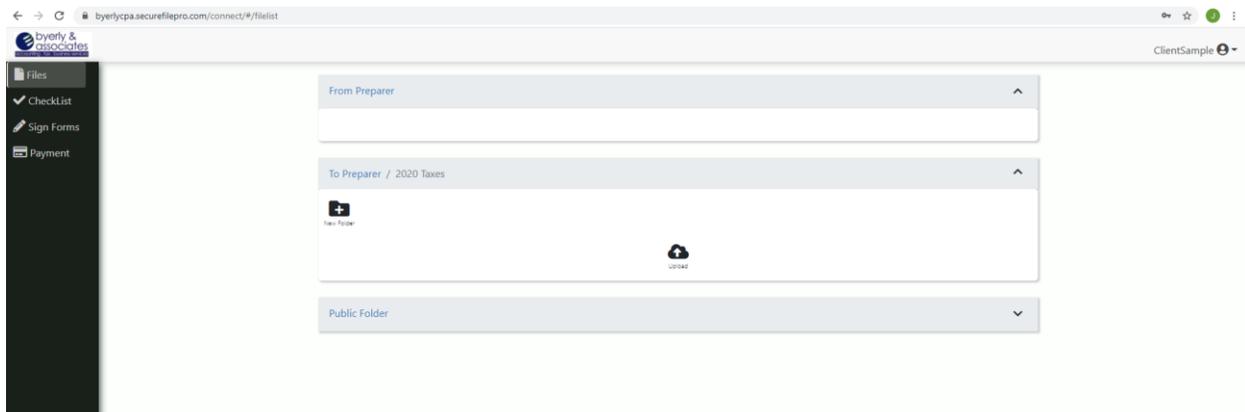


4. To view your SecureFilePro account information, click on your username in the upper-righthand corner of the screen. Select "Account" in the drop-down tab to open your account information. This is where you can update your password or enable two-factor authentication.

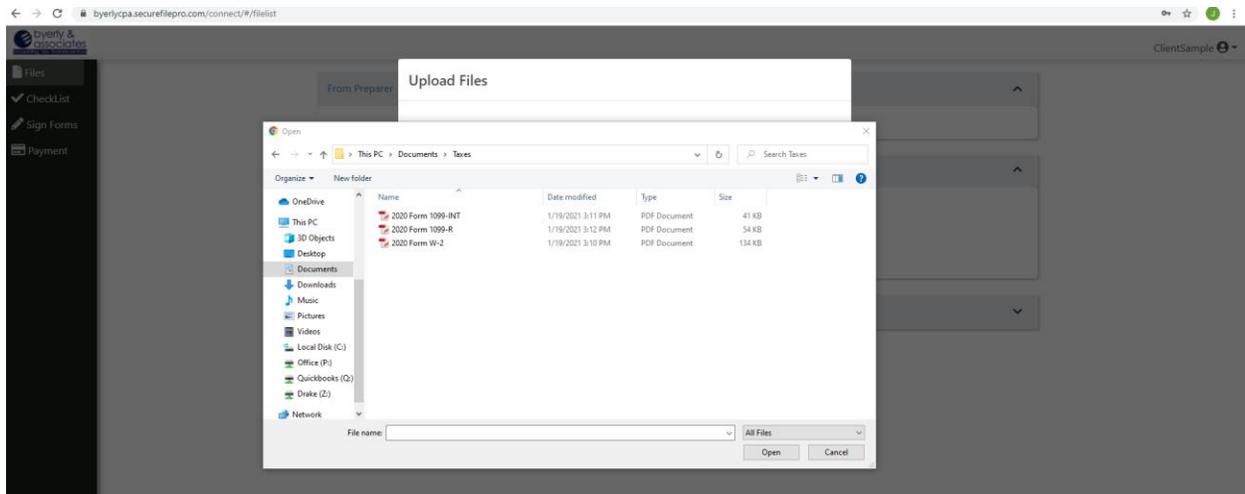


5. Once you have logged into your portal, you will see the document upload page. It will look like the example above. You will see two main sections titled "From Preparer" and "To Preparer." "To Preparer" is where you will locate your Tax Return and signature documents once complete. "From Preparer" is where you will upload your tax documents for preparation.

In the "To Preparer" section, click "New Folder" to create a new folder for your 2020 tax documents. You will title this folder "2020 Taxes."



6. Once you have created the "2020 Taxes" folder, click on the folder to open it and to upload your tax documents.



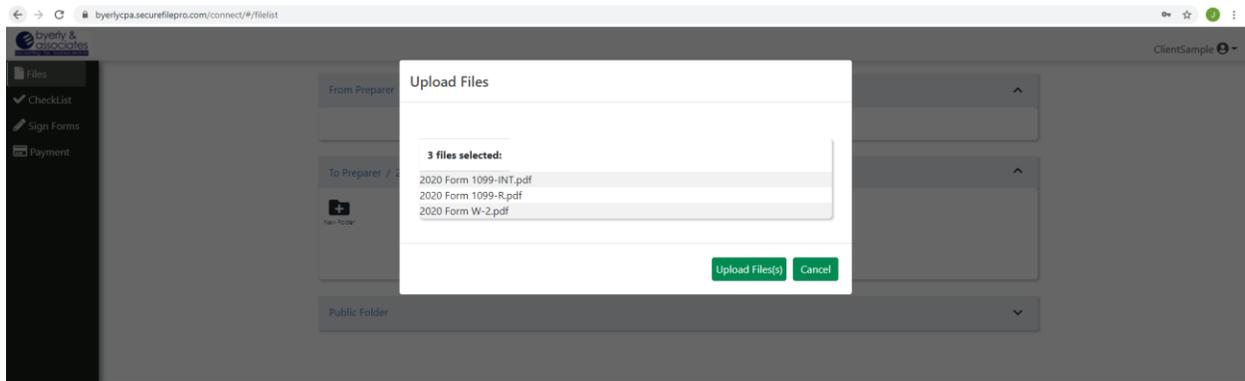
7. When you click on the “2020 Taxes” folder, an upload window will open for you to select your tax documents to upload. It will look like the example above. Select in this window where your tax documents are located on your device. Select the tax documents you wish to upload to the portal and click “Open.”

*Don't have a scanner? No problem! Did you know that you can easily scan documents using only your smartphone? See the links below for instructions how to use iPhone, Google, and Samsung phones to scan documents.

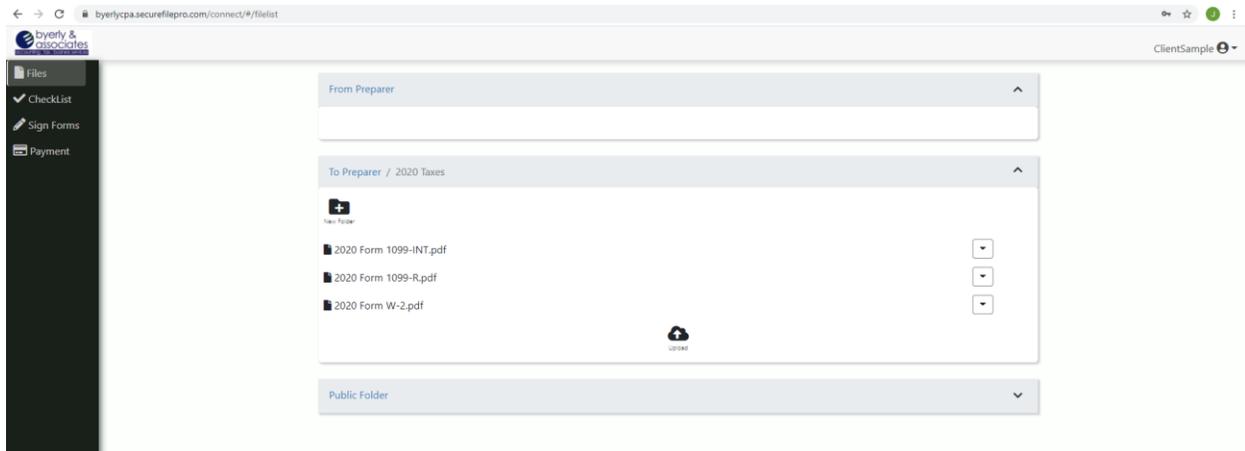
<https://support.apple.com/en-us/HT210336>

<https://support.google.com/drive/answer/3145835?co=GENIE.Platform%3DAndroid&hl=en>

<https://insights.samsung.com/2020/10/07/how-to-scan-documents-on-your-galaxy-smartphone/>



8. Once you have selected the documents you would like to upload from your device, they will appear in an upload window for review. Confirm that all the documents listed are the documents you wish to upload. If yes, then click “Upload File(s)”.



9. Your uploaded tax documents will appear in the folder “2020 Taxes” in the section “To Preparer.”

To upload additional tax documents to the portal, click again on the “2020 Taxes” folder and follow the same uploading instructions.

You Have New File(s) from Byerly & Associates, CPA



no-r...@securefilepro.com

to me ▾



Hello **Sample Client**,

You have received new file(s) from **Byerly & Associates, CPA**.

Your username is: **ClientSample**.

To download your file, follow the link below.

<https://byerlycpa.SecureFilePro.com/connect/#/filelist>

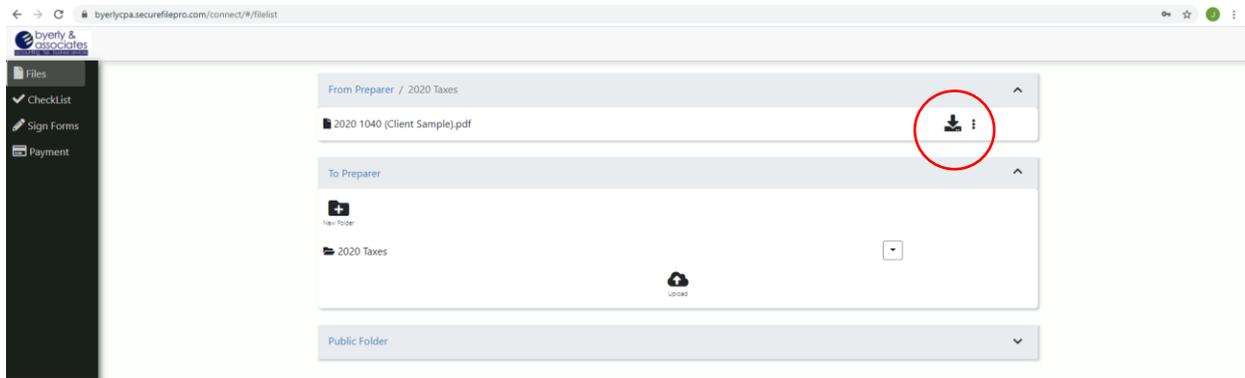
If clicking the link doesn't work, you can copy and paste it into your browser's address bar.

If you have any questions, please contact us.

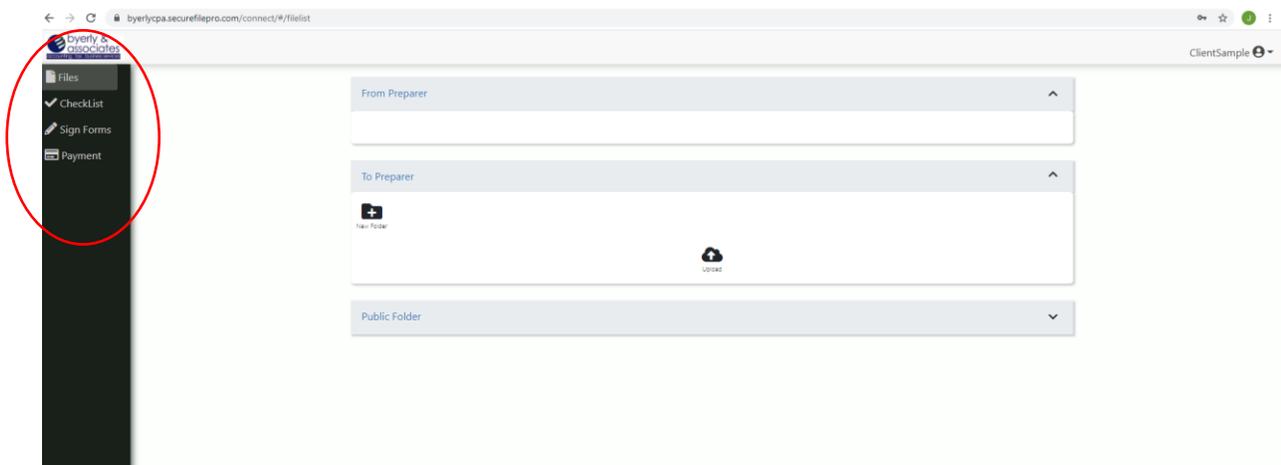
10. When your tax return and signature documents are complete, our team at the Byerly office will upload your documents into this same portal. You will receive a notification email like the example above to let you know when new files have been uploaded by our team.



11. Click the link in the notification email to open your SecureFilePro portal. Log into your account using your previous username (provided in the notification email) and your password. Once logged in, you will see a folder titled "2020 Taxes" under the "From Preparer" section.



12. Click the “2020 Taxes” folder under the section “From Preparer” to open the folder. You will see your tax return and signature documents uploaded by our team. To download the documents, click the arrow to the right of the file.



13. To the left of the window, you will see a panel of additional portal features.

Checklist: Here you can find a checklist of tax documents to help you in collecting and providing all the documents our team will need to prepare your return.

Sign Forms: You will use this feature to sign your signature documents once prepared.

Payment: Upon receiving your complete tax return, you can remit payment here.