



CLIENT PORTAL INSTRUCTIONS

RS&F uses LeapFILE as its client portal and file transfer platform. There are three main functions that can be used with LeapFILE:

- Secure Upload
- Secure Download
- File Portal

To use the various LeapFILE functions, go to the following URL: <http://rsf.leapfile.net>. To access the portal, a guest user will need a designated login (to be provided by an RS&F staff person) and use the initial password of **rsfguest123**. Upon your first time logging into the portal, you will be prompted to select a unique password. To request a new guest user account for various employees who will be using the portal to communicate with RS&F, contact the RS&F staff person with whom you have contact for a specific engagement.

Instructions for using the three noted functions are as follows:

Secure Upload

The secure upload function allows a user to efficiently and securely remit a file or files to an RS&F employee. Note that files sent through the Secure Upload function will not be automatically stored to a portal. To use this function, do the following:

1. Select Secure Upload from RS&F's LeapFILE homepage (noted above).
2. Input the e-mail address for the RS&F staff person to whom you wish to remit a file or files and select Start.
3. Complete the form, which requires your name, e-mail address, a message subject and note, and delivery options.
4. Select either a regular upload (which allows for multiple file uploads using a browse function, although the files must be selected individually) or an enhanced upload (which allows for multiple file uploads using a browse function and multiple files can be selected at one time if they reside in the same file on your computer; files may also be 'dragged and dropped' into the browser).
5. To use the enhanced upload function, Java is required on your computer. To select multiple files, select Add and navigate to the directory containing the files you wish to transmit. Select one file and then hold down the Ctrl key on your keyboard. Select the other files to be transmitted and then select Open.
6. Select Upload & Send (for a regular upload) or Upload (for an enhanced upload).



Secure Download

The secure download function is initiated by an RS&F employee, who may remit a file to be downloaded one time by a client or other authorized third-parties. When a secure download is sent to a non-RS&F individual, that person will receive an e-mail that contains a unique Tracking Code that must be used to access that file. If you receive such an e-mail, the file can be accessed as follows:

1. Select Secure Download from RS&F's LeapFILE homepage (noted above).
2. Enter your e-mail address and tracking code (which needs to correspond to the exact e-mail address and tracking code from the notification e-mail).
3. Select the Download icon for an individual file or the Download icon next to the Enhanced Download reference. The Enhanced Download function allows for multiple sent files to be downloaded at one time rather than individually.

File Portal

The file portal allows for file management functionality between a client and RS&F. Examples of files that may be uploaded to the portal include workpapers, tax returns, e-file forms, etc. Guest users may only download files from the portal, however files sent securely through LeapFILE may be added by RS&F to the portal for future access by a guest user. To use the file portal, do the following:

1. Select File Portal from RS&F's LeapFILE homepage (noted above).
2. Enter your login ID and password (as previously noted, the initial password must be changed by the guest user and RS&F will provide a guest user with their respective login ID) and select Login.
3. The portal(s) to which you have access will be listed. Select the respective portal you wish to access.
4. Either select the noted Download icon or select files that you wish to download and select Download Selected.
5. From the File Portal, you may send or receive files (in the same manner as the Secure Upload and Secure Download functions) by selecting Send Files or Inbox.