

# **LeapFILE Quick Reference Guide for Clients**

## **UPLOAD FILES**

- 1. Browse to <u>http://www.CLAconnect.com/</u>. Note: LeapFILE works with any browser.
- 2. At the top right side of the page click on **CLIENT LOGIN** and choose **SECURE FILE TRANSFER** (LEAPFILE) from the list.



4. Enter the CliftonLarsonAllen employee's email address (ie. John.Doe@CLAconnect.com), then click on the **Start** button.



- 5. Enter your name and email address.
- 6. Type a Subject and message to the recipient. If you want to track the transfer, check the box for **"Notify me when the files have been downloaded."**
- 7. Click on Select Files to send (Regular Upload) and then browse to each file separately.
- 8. Or, click on **Select Files and Folders to Send (Enhanced Upload)** and then browse and select multiple files at once.

aliwar Tay John Das	Char E
enver to. John Doe	Step 5
Please enter your contact information	
Name	
Email	
Confirm Email	
	Step 6
Please create a message for the recip	pient
It's a good idea to describe exactly wh	' nat you are sending and include any additional contact in
2	, 2 ,
Subject	
Subject	
Subject Message/Description/Instructio	ins
Subject Message/Description/Instructio	ns ^
Subject Message/Description/Instructio	ns 🔺
Subject Message/Description/Instructio	ns
Subject Message/Description/Instructio	ns
Subject Message/Description/Instructio	nns v
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Subject Message/Description/Instructio Select delivery options	nns
Subject Message/Description/Instructio Select delivery options Notify me when the files have	e been downloaded.

### REGULAR UPLOAD – INDIVIDUAL FILES

Browse to each file you need to upload – one or many.

	Regular Upload View	
- Select files to u	pload	
File #1		Browse
File #2		Browse
File #3		Browse
File #4		Browse
File #5		Browse
File #6		Browse
File #7		Browse
File #8		Browse
File #9		Browse
File #10		Browse
	** More files selectors will automatically appear if you run out **	

## ENHANCED UPLOAD – FOLDERS AND FILES

Browse to multiple files and folders to send.

ecure Upload		Enhanced Uploa	d View	
	Add	Remove	Remove Al	
Directory	File		Size	
				=
				-
			Upload	

After choosing the files and/or folders, click on **Upload & Send** or **Upload.** The selected file(s) will be sent.

# **DOWNLOAD FILES**

1. You will receive an email with a link. Click on the link. Then, respond to the security question prompt with the answer you were provided.

From:	John Doe	
To:	Steve Stevens	Encel Method Economic
Cc		Email Notice Example
Subject:	File Transfer	
	*** You have a	secure file transfer awaiting download. Details enclosed. ***
	FROM: Joh	n.Doe@cliftonlarsonallen.com
	TO: Ste	veStevens@gmail.com
	SUBJECT: File	Transfer
	FILE TRANSI	FER WAITING:
	Click the secure	link to download.
	http://cliftonlars	onallen.leapfile.net/get.jsp?t=4028817e3ca87f75013cd476ff4850e2
	(TRANSFER E	XPIRES February 20, 2013 10:50 AM)
	Requested files.	

- 2. You can download the files individually by clicking on the **Download** button next to each file, then browsing to where you want to save the files.
- 3. Alternatively you may download all of the files at one time by clicking on the **Zip All** button. This will download a zip file, which includes all of the files in the transfer, to the location you specify. You will then need to unzip the files.

Ψ <b>Λ</b>	CliftonLarso	nAllen		
Secure	Download			
Date	2/13/13 10:50:33 AM GM	T-06:00		
From To	John Doe Steve Stevens			
Subject	File Transfer			
Files Filename		Size	Action	Step 2
Checklist (	)1.doc	292.5 KB	DOWNLOAD	×
Excel Doc 2.xls		19.5 KB	DOWNLOAD	
image001.	png	3.433 KB	DOWNLOAD	
image002.	png	7.39 KB	DOWNLOAD	
Lease Agre	eement 1.pdf	260.471 KB	DOWNLOAD	01
Tax Organ	izer (1).pdf	1.302 MB	DOWNLOAD	Step 3
Batch dow	vnload all files in one zip file		ZIP All	×

 To unzip files, right click on the zip file and choose Open with → Compressed (zipped) Folders. In the window, click on Extract all files and complete the extraction wizard to extract the files to a location you choose.

### **QUESTIONS OR PROBLEMS?**

Please contact your CliftonLarsonAllen representative.