

# Secure File Exchange

(powered by LeapFILE)

## Client Instructions



- Click on the link “Client Portal” for the Online Portal and File Exchange



All GRF clients can use the portal service, as an added benefit of doing business with the firm (thank you!). The primary benefits of storing documents on the portal include the following:

- ▶ **Security:** Documents housed on the client portal will never be sent to the wrong location or individual, and cannot be intercepted by a third party.
- ▶ **Self-service access:** Clients can always access their critical documents, edit and store them again. Access is password-protected.

All GRF clients who wish to use the online client portal must first complete a client portal application and sign an agreement form. The client portal can be accessed by clicking the image above.

- ▶ [Client Portal User Agreement Form](#)
- ▶ [Client Portal Application](#)
- ▶ [Client Portal User Guide](#)

Completed portal agreement forms and applications can be sent to Portal Administrator, via email at [portaladmin\[at\]grfcpa\[dot\]com](mailto:portaladmin[at]grfcpa[dot]com) or by post to Portal Administrator's attention at Gelman, Rosenberg & Freedman CPAs, 4550 Montgomery Avenue, Suite 650N, Bethesda, MD 20814.

### SECURE FILE EXCHANGE



Clients who exchange files with GRF via this service will have the peace of mind knowing their documents are benefiting from an additional level of online security. Before utilizing this service by clicking on the image above, please read the [Secure File Exchange Client Instructions](#).

### NEED ASSISTANCE?

Please contact the Portal Administrator at [301-951-9090](tel:301-951-9090) or via email at [portaladmin\[at\]grfcpa\[dot\]com](mailto:portaladmin[at]grfcpa[dot]com) with any questions.

- Click on the icon for Secure File Exchange or simply go directly to <http://grfcpa.leapfile.com/>

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CERTIFIED PUBLIC ACCOUNTANTS

## Secure File Exchange

Welcome to the GRF Secure File Exchange. You can use this service to send us files or to receive files from us. All transfers are confidential and SSL encrypted.

**Secure Upload**  
Send files to GRF

**Secure Download**  
Download files sent to you by GRF. Please have your download tracking code ready.

**File Portal**  
Browse and download files. A guest account is required.

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Employee Login - [Privacy Policy](#) - [Security Statement](#) - Copyright ©2012 LeapFILE. All rights reserved.

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- The screen above should appear after clicking the icon or directly accessing the link from the previous page.
- Click **Secure Upload** to send a file to GRF.

## Secure Upload

### Available Recipients

- ☐ Administrator
  - ☐ Dino Karamalakis
  - ☐ Elinor Litwack
  - ☐ General Mailbox
  - ☐ Ian Shuman
  - ☐ Jackie Oneto
  - ☐ Jill Leonard
  - ☐ John Pace
  - ☐ Judy Lasley
  - ☐ Kashif Ali
  - ☐ Kathleen Fiskien
  - ☐ Leigh Ploff
  - ☐ Michael Meyers
  - ☐ Neal Becker
  - ☐ Steven Lyons
- 

- Please select the appropriate email address from the list of available recipients.
- If the recipient you need to send your files to is not listed, you may choose **General Mailbox**. Sending an email to the *General Mailbox* will go in our general repository which is checked continuously. The next step will specifically address how you can get it to the recipient that you require.
- Click **Submit** to continue to the next step.

GRF | Powered By LeapFILE - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: <https://secure.leapfile.com/fts/drop/custom/upload/Drop.jsp?sessionId=97F83295E22AEE3EB4C92603F4E620697oid=4028817a14dc3feb01154d5165001060>

Go Links

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## Secure Upload

Deliver To: GRF\_FTP

Please enter your contact information

Name  
Joe Client

Email  
joeclient@email.com

Confirm Email  
joeclient@email.com

Please create a message for the recipient

It's a good idea to describe exactly what you are sending and include any additional contact info.

Subject  
FOR WALTER

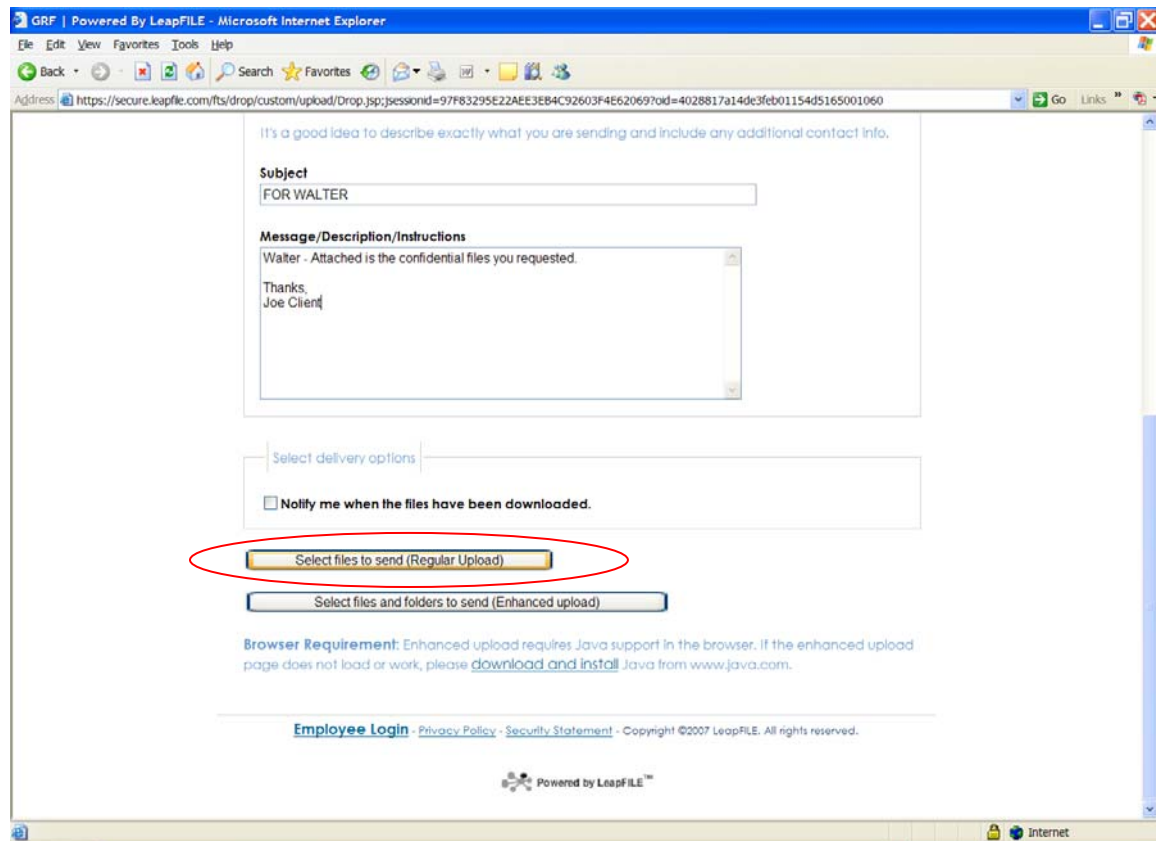
Message/Description/Instructions  
Walter - Attached is the confidential files you requested.  
Thanks,  
Joe Client

Done

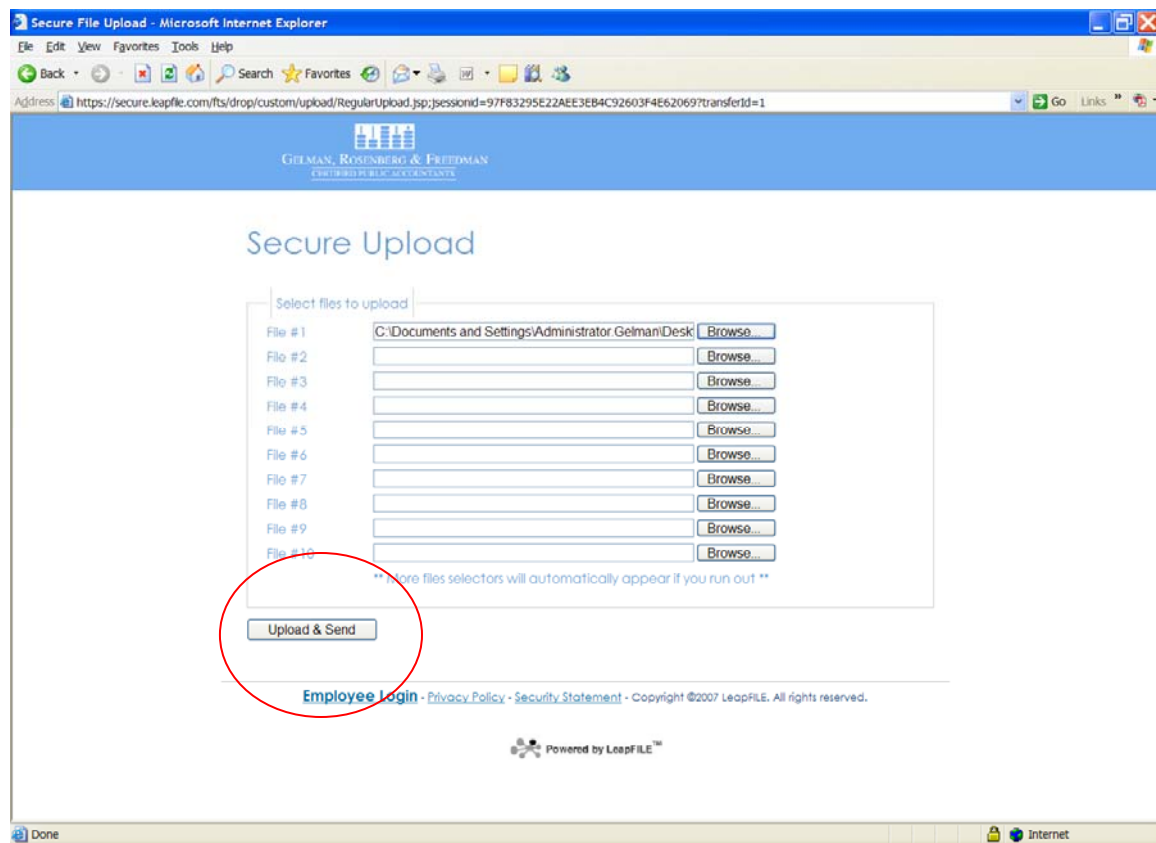
Internet

- Section 1: Enter the required information. You will only need to type this in the first time when visiting this site.
- Section 2: Create your email message. Be sure to complete the *Subject* and *Body* section.

Please note: If you selected to send files to **General Mailbox**, please be sure to enter in who the email is for in the *Subject* of the email. This ensures your email will be delivered to the appropriate person.



- Please make sure that the information in the *Subject* and *Message* are final as attaching a file is the last step before sending.
- Click **Send files to send (Regular Upload)** to continue and attach your file(s).



- Attach your file(s), click the **Browse** button and locate the file that you want to attach. You can select up to 10 files. The total of those files cannot exceed 10 GB.

*Tip: If you have multiple files to upload, from your computer place all of them in a folder and then zip/compress the folder. That will allow you to select that zipped/compressed folder (and all the files it contains) as one file.*

If you experience additional difficulties, please send an email to [info@grfcpa.com](mailto:info@grfcpa.com) along with your contact information and a request to be contacted for additional assistance.

Thank you.