How to Use the Bottom Line's Secure Client Portal

Because of the pandemic, we aren't seeing clients in person for the foreseeable future, which may complicate getting us your tax documents and information. You can always drop off or mail us your documents (the Bottom Line, 4116 Houghton Street, Philadelphia PA 19128) or fax them to us (215-701-7538). But the fastest and safest way to get them to us is to use our Secure Client Port.

(Please note: For security reasons, the IRS does not allow tax preparers to download email attachments. Please do not attach documents or photos when you email us.)

We understand that everyone has different levels of internet skills, so below is a quick tutorial on how to use our portal.

Accessing the Portal

Our portal is located at https://thebottomline.securefilepro.com

Returning Clients will need to know your Username and Password. If you don't remember them from last year, email Carolyn (thebottomlineinc.net@gmail,com) and ask her to send you an activation email

If you are a **New Client** you can use the Guest Exchange until an account is created for you (directions on page 3)
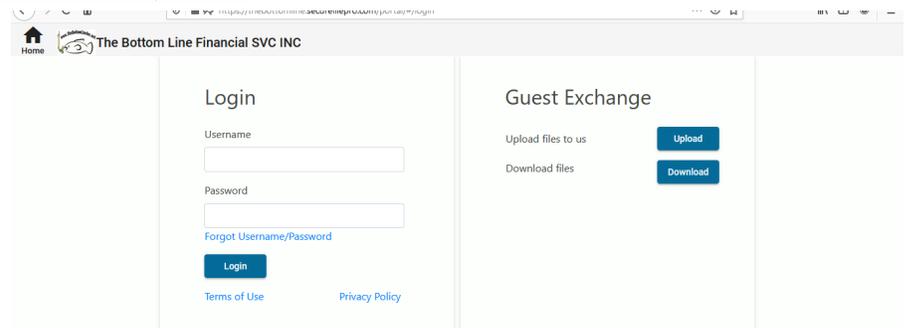
Returning Clients: Once you have logged in you will immediately see your portal account.

FROM PREPARER is where you will find documents and tax returns we have uploaded for you.
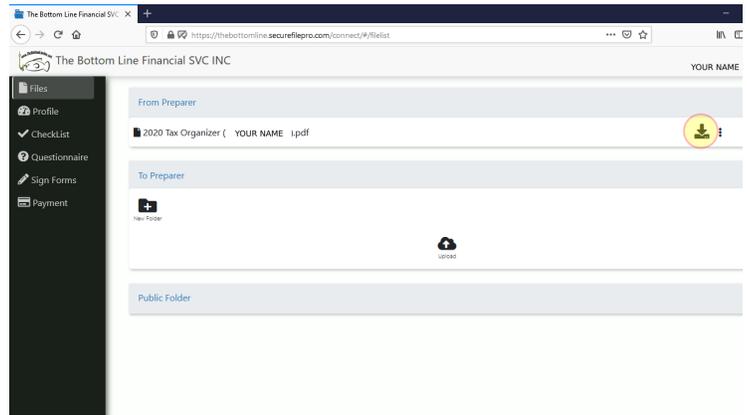
TO PREPARER is where you can upload your documents and we will get them.

The Black Navigation Bar on the left lets you move to different pages on the portal. NOTE: We will only be using the FILES and SIGN FORMS pages
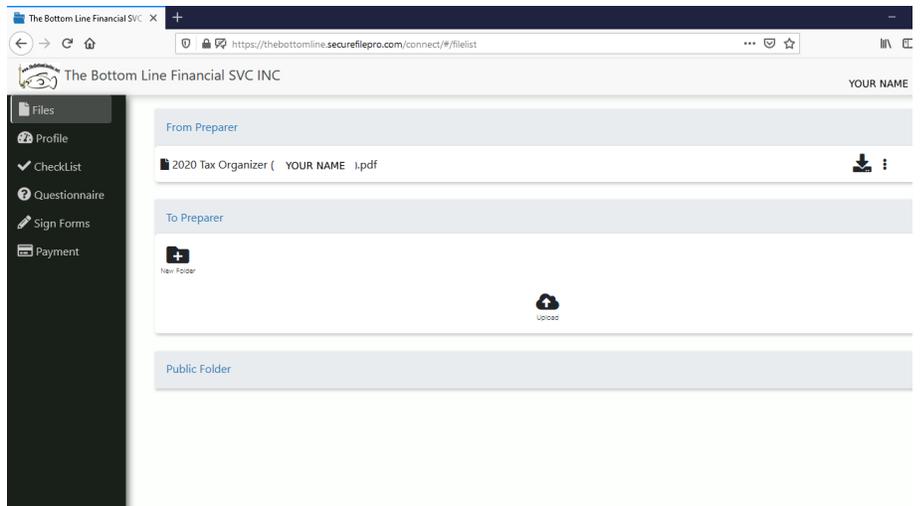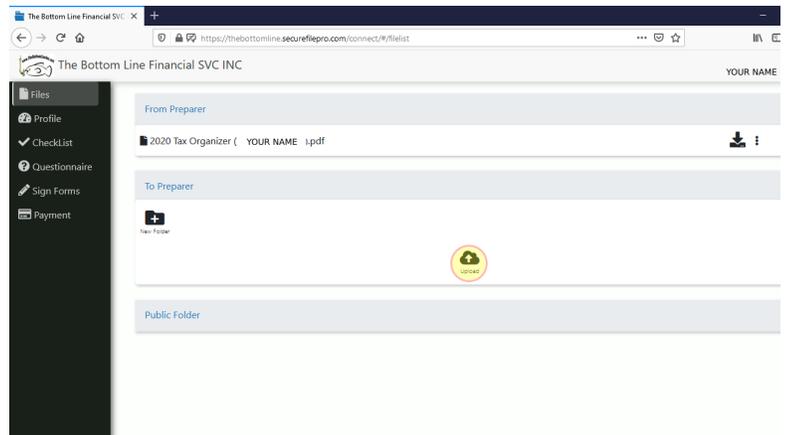
Returning Clients continued

To **DOWNLOAD DOCUMENTS**, click on the down arrow (highlighted in yellow in this image)

To **UPLOAD DOCUMENTS** and **FILES**, click on the up arrow (highlighted here in yellow)

A new window will pop up, allowing you to select the documents and files you want to upload.

Click on the documents and then click on the **OPEN** button.

If you want to upload more than one file at a time, hold the **CTRL** key down on your keyboard while clicking on the files. Release the key and then click on **OPEN**
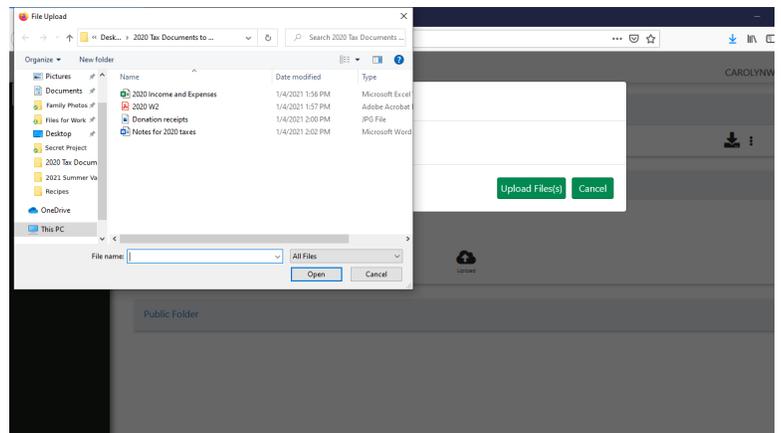

Another window will show you the files you are about to upload.

Click the **UPLOAD FILE(S)** button

Your files will be saved on the portal, but only for a limited time. Make sure you keep a copy of them on your computer.

We will be notified when you upload to the portal, but during the busy tax season it is helpful if you send an email (thebottomlineinc.net@gmail.com) to make sure we see the notification
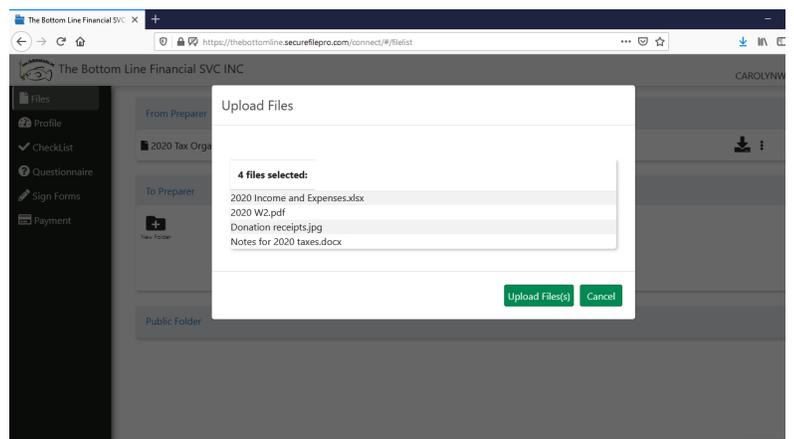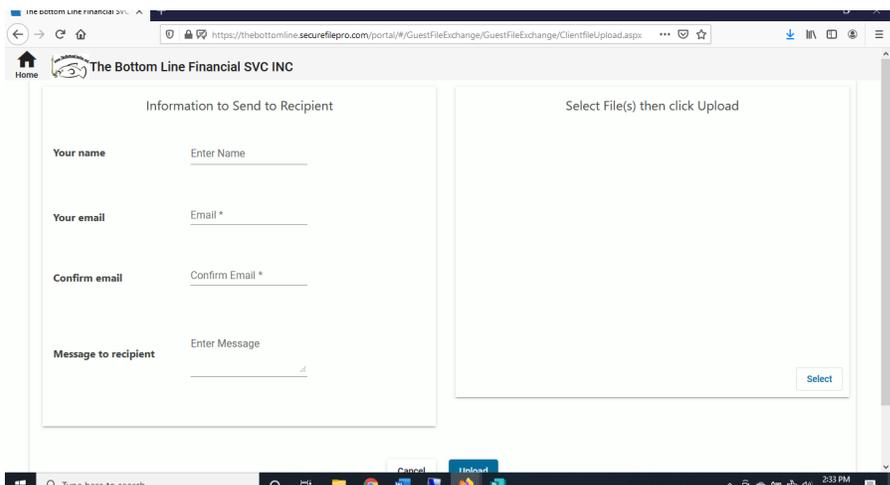
New Clients can use the Guest Exchange to Upload Documents

NOTE: At this time we are not using the Download Files function. Please only click on the **Upload Files** button
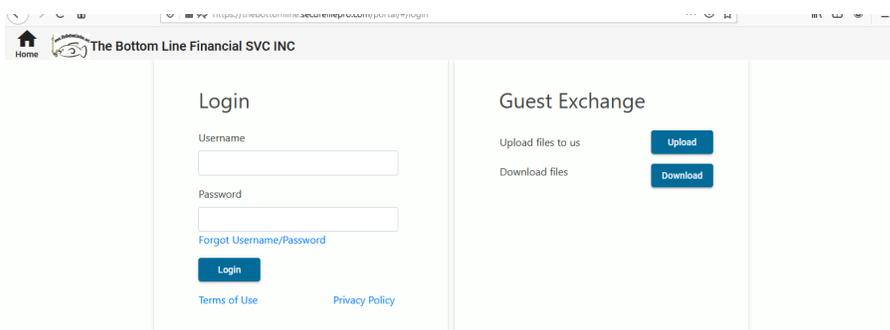
To Upload Files you will need to enter your name, your email address (twice). There's also a place where you can send us a message.

Click on the **SELECT** button in the lower right hand corner.

A new window will pop up, allowing you to select the documents and files you want to upload.

Click on the documents and click on the **OPEN** button.

If you want to upload more than one file, hold the **CTRL** button down on your keyboard while clicking on the files. Release the key and then click on **OPEN**