



Client Reference Card for Use of the Portal

Please add no-reply@securedrawer.com to your Safe Senders list to avoid Portal related emails being sent to your spam folder.

File Transfer

1. Login on to the Portal via the “Client Access” tab on the Bender & Company home page (www.bendercpa.com)
2. Click the “Documents” button for the client you wish to access.
3. To browse a file in the Portal
 - a. Click “view” to the right of the file.
 - b. Exit the viewer to return to the list of files
4. To copy a file into the Portal from your PC environment
 - a. Select “Upload/Send”
 - b. Click “File Browser” and select the file(s) you want to upload. Enter the file browser as many times as necessary to select all the files you want to upload to this client.
 - c. Click “Start Upload(s)” to upload the files.
5. To copy a file from the Portal into your PC environment
 - a. Click “Download” to the right of the file.
 - b. Select “Save” and save the file to the network.

Change Password

1. Login on to the Portal via the “Client Access” tab on the Bender & Company home page (www.bendercpa.com)
2. Click on the “Settings” tab on the menu bar.
3. Input the new password and confirm the entry under “User Credentials”
4. Click “Update”

Recover Lost/Forgotten Password

1. Navigate to the portal login via the “Client Access” tab on the Bender & Company home page (www.bendercpa.com)
2. Select “Forgot Password”
3. Enter your e-mail address used to login to the client portal. Click “Submit”
4. You should receive an email from no-reply@securedrawer.com. Select the link to confirm the password reset.
5. You will then receive another email with your new temporary password.
6. Once you login, you will be prompted to provide your own password.