

Adjusting File Retention Settings

Step 1.

As an Accountant/Admin, Log into CPA Secure.

Step 2.

[skip repetitive navigation](#)
ALL DATA EXCHANGED THROUGH THIS SITE IS SECURED USING 256-BIT STRONG SSL/AES ENCRYPTION.
Signed onto CPA Secure as Sample Admin (sample@cpasecure.com). [Sign Out](#)


[Home](#)
[Users](#)
[Folders](#)
[Logs](#)

Find File/Folder:

Find User:

Go To Folder:
./Sample Admin

Need Help?
[Tech Support](#)



C.P.A. Secure

Sample Admin Account
123 West Mission, Suite 123, Garden Court
Spokane, WA., 99206

[Home](#)

[Home/Sample Admin](#)


Name	Created	Size/Contents	Creator
Client Uploads	1/9/2008 1:27:16 AM		

[Advanced View](#) - [Add Folder](#) - [Permissions and Settings](#)

Select the "Folders" link in the upper left hand area.

Step 3.

[skip repetitive navigation](#)
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C.P.A. Secure

Sample Admin Account
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(All Folders)

[Advanced View](#) - [Return to Basic View](#)

[Folders and Files](#)

Name	Created	Size	Creator	#	1st	Actions
Home		3				

Check Folders: [All](#) - [Empty](#) - [Not Empty](#) - [None](#) [Basic View](#)

Select the folder labeled "Home".

Step 4.

[skip repetitive navigation](#)

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Signed onto CPA Secure as **Sample Admin** (sample@cpasecure.com).

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Find File/Folder:

[Find File](#)

Find User:

[Find User](#)

Go To Folder:

./Sample Admin

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[Home /](#)

[Folders and Files](#)

Name	Created	Size/Contents	Creator
Sample Admin	1/9/2008 1:22:17 AM	1 0	
Sample User 2 CPA Secure	1/9/2008 3:10:43 AM		
Sample User CPA Secure	1/9/2008 3:07:29 AM		

[Advanced View](#)

All time and date stamps

Select the "Client" folder you wish to adjust.

Step 5.

[skip repetitive navigation](#)

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Find File/Folder:

[Find File](#)

Find User:

[Find User](#)

Go To Folder:

./Sample Admin

[Go To](#)

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Sample Admin Account

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[Home / Sample User CPA Secure](#)

[Folders and Files](#)

[Parent Folder](#)

There are no files or folders in this folder.

[Advanced View](#) - [Add Folder](#) - [Permissions and Settings](#)

Select the link "Permissions and Settings".

Step 6.

they uploaded.

Upload Confirmation to Sender:

- No Yes (immediately)
- Yes (include in upload summary after minutes)

New File Alert to Recipient:

- No Yes (immediately)
- Yes (include in upload summary after minutes)

Delivery Receipt to Sender:

- No Yes (immediately)

Alert Sender if File is Not Downloaded:

- No Yes (after Days)

Scroll Down



Change Automated Maintenance Settings...

Cleanup: Enabled

Delete old files after days

Delete empty subfolders after days

Display New Files: For days

← Adjust when to delete old files.

← Adjust when to set "New Files" to "Old File" status.

NOTE: Fields should NOT add up to more than 60-Days.

Adjust "Delete old files after" and "Display New Files for" fields to the desired retention period.

Examples of File Retention Policy Using the Settings Shown Above -

Example 1. An accountant uploads a file to a client on day one. Client downloads the file on day two. CPA Secure maintenance routines will remove this file from the system on day 6.

Example 2. An accountant uploads a file to a client on day one. Client downloads the file on day eight. CPA Secure maintenance routines will remove this file from the system on day 10.

Example 3. An accountant uploads a file to a client on day one. Clients does not attempt to download the file until day eleven. CPA Secure maintenance routines already removed this file on day ten before the client had logged in to download the file.

Summary - An additional explanation of the CPA Secure Default File Retention Policy could also be stated in this manner: A file that is downloaded by your client will remain on the system for 5-days after the file is download to give your client the option of downloading the file again should they need to for any reason. If your client has not attempted to download their file the system will remove this file in 10-days and the accountant will need to upload the file to the client again if the file is still needed by the client.