



CERTIFIED PUBLIC
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Getting Started with ShareFile

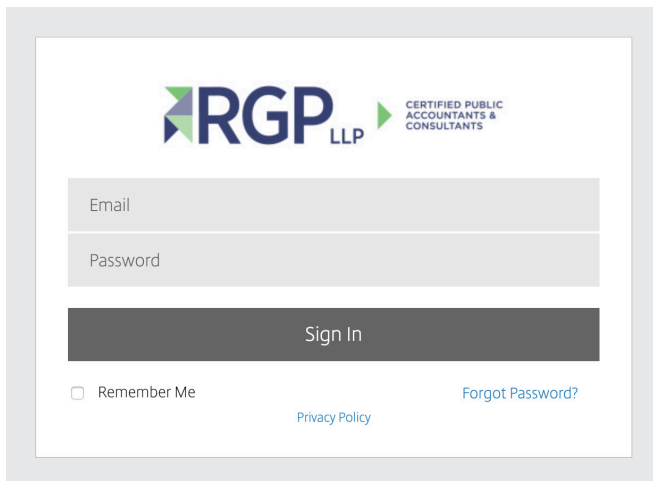
Here are five basics of ShareFile to help you get started accessing, downloading and uploading files faster as a Client user.

ShareFile recently unveiled some new and exciting changes. Click here for more information about New ShareFile and UI improvements.

How to log in

1. Enter the URL of the company's ShareFile account in the form of **rgpllp.sharefile.com** in any Web browser. The subdomain is usually the company's name.
2. Enter your username as your email address associated with the account.
3. Enter your password, and click **Log In**. You will be taken to the Dashboard menu.

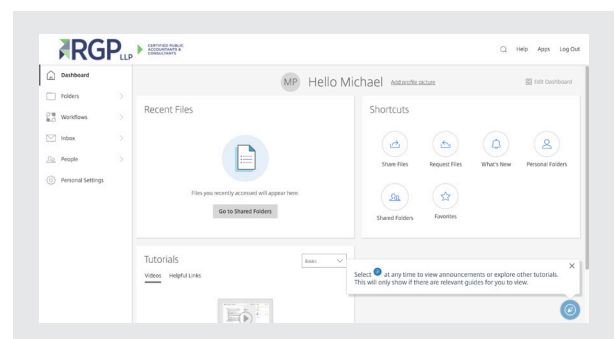
If you cannot remember your password, click **Forgot Password**.



The login form features the RGP LLP logo at the top, which includes the text 'CERTIFIED PUBLIC ACCOUNTANTS & CONSULTANTS'. Below the logo are two input fields labeled 'Email' and 'Password'. A large 'Sign In' button is positioned below these fields. At the bottom left, there is a 'Remember Me' checkbox. At the bottom right, there is a 'Forgot Password?' link and a 'Privacy Policy' link.

Account Dashboard

1. The Dashboard is the first page that all users see upon signing into the ShareFile account.
2. Menu items and buttons will be displayed depending on your account permissions and abilities as set by the Administrator.
3. Recent Files will display up to 5 files that you previously accessed from the current web browser.
4. Use the navigation menu on the left side of the page to get access folders and settings. If you do not have a page or menu, consult with an account Admin about obtaining permissions.



How to upload files in your account

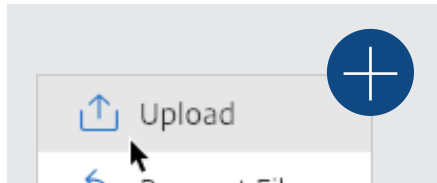
1. You may only upload files to folders where you have been given the **Upload** permission.

***Note:** you can be sent a Request to upload files from a user on the account. If you are responding to an email request to upload files, skip to the following page for instructions.*

2. Navigate to the folder where you wish to upload files.

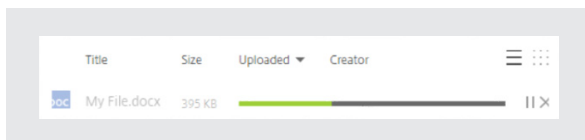
Since you are a client user, your folder will be located in the **Shared Folders** section of the account. (If you do not have folders to access, no folders have been shared with you.)

3. Access the blue Action Button and select Upload.



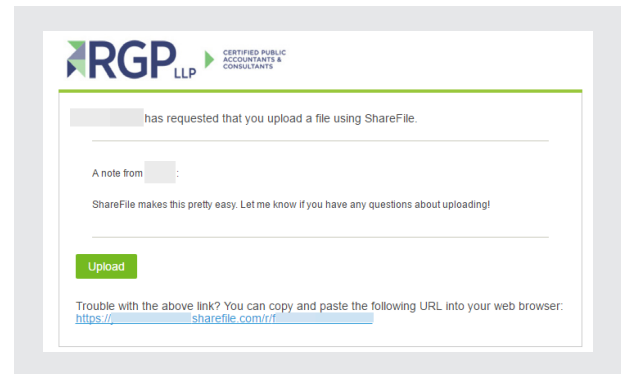
4. Drag your files from your computer into the **Drag Files Here** area, or click **Browse** files to select them manually. Click Upload when ready.

Your files will be uploaded. Upload speed can vary based on your internet connection.



How to upload files to a Request link

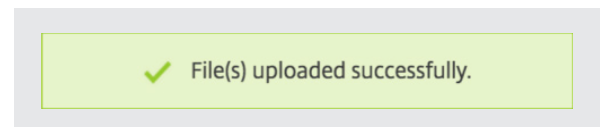
1. Click the link located in the email from the person requesting files. The link may either appear as a **ShareFile URL** or as a banner with the link: **Click here to upload files.**



2. On the screen that appears, drag and drop the files you wish to upload from your computer folder or desktop to the box on the screen.

***Note:** Depending on the original requester's message settings, you may be required to enter your name and email address before you can upload any files.*

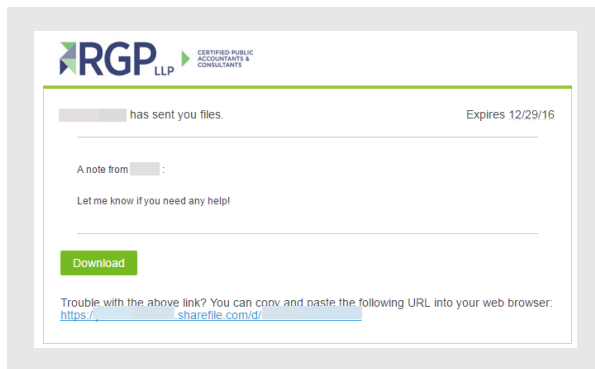
3. When you've placed all files you wish to upload in the box, click **Upload**. A success message will be displayed once your upload is complete.



How to download files from a ShareFile Link

1. Click the link located in the email from the person sending you files. The link may appear as a ShareFile URL or a Download button.

Note: Depending on the original sender's message settings, you may be required to enter your name and email address before you can upload any files.



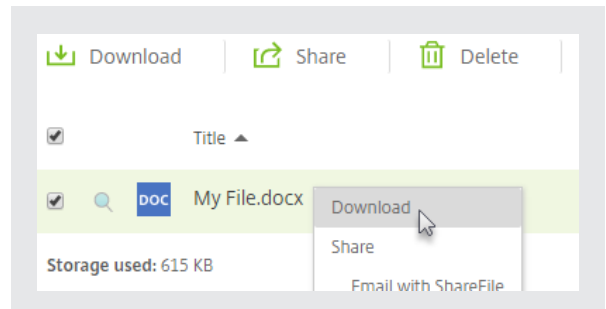
2. On the download page, you can download and preview the file (or files). If you were sent a single file, the file will be displayed in the content viewer. Use the green Download button to download the files.

When downloading files from ShareFile, the files will be downloaded to your computer.

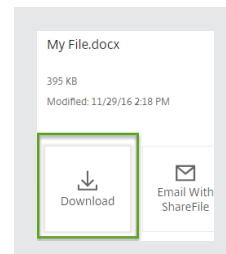
Depending on your browser settings, you may be prompted to select where files should be downloaded to.

How to download files from a ShareFile Link

1. Navigate to the folder in your ShareFile account that contains the file you wish to download.
2. To download a single file, **right-click the file and select the Download option.**



To preview the file before downloading it, simply **click the file name once** to open it in the Content Viewer. From the viewer, click the Download button on the right.



Note: You can download multiple files at once by using the checkboxes on the left side of each file name. Select the files then click the Download button that appears in the content menu above the file list.

3. The file(s) will be downloaded to your computer. Depending on your browser settings, you may be prompted to select where files should be downloaded to.



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