

## CLIENT INSTRUCTIONS FOR USING SHAREFILE

*ShareFile is a tool for sending, receiving, and organizing your business files online. It can be used as a password-protected area for sharing information between the Zlotnick, Laws, & Sandoval organization and our clients and it's an easy way to send files that are too large to e-mail.*

### Your new ShareFile Account Setup Process

1. A representative at ZLS will create a new account for you on ShareFile.
2. Once the account is created, you will receive an email indicating "I Have Added You to a Folder on ShareFile". Open this message for a link to access your new account.
3. The email will give you a temporary password to login to your account. Click on the link to proceed to login.
4. Once you login with the temporary password, you will be prompted to change the login to a password unique to you.
5. Check the settings, then click the "Save" button.
6. You will then be logged into the account that was created for you.

### How to Download Files from ShareFile to your Computer

1. Login to ShareFile.
2. Click on your client folder and navigate to the document you wish to download.
3. Check the box next to the document(s) you wish to download to your computer.
4. Click "Download".
5. Click "Save" and save to a specified location on your computer.

### How to Upload Files from your Computer to ShareFile

1. Once logged in, click on your client folder.
2. Click the button "Upload Files".
3. Browse for the File(s), add a Title, then click "Upload Files".
4. You should see the document appear in the ShareFile folder.

### Tips & Tricks

- Click the arrows on the "Folders" bar on the left hand side of your screen to see a hierarchal view of folders available and for quick navigation to folders.
- Click "My Settings" on the upper right hand side of the screen to change settings and access tools such as:
  - a. Edit basic information
  - b. Add/ Edit Email Addresses
  - c. Change Password
  - d. Edit Upload Preferences
  - e. FTP Settings
  - f. Desktop Tools
  - g. Mobile Tools