

# Getting Started with ShareFile

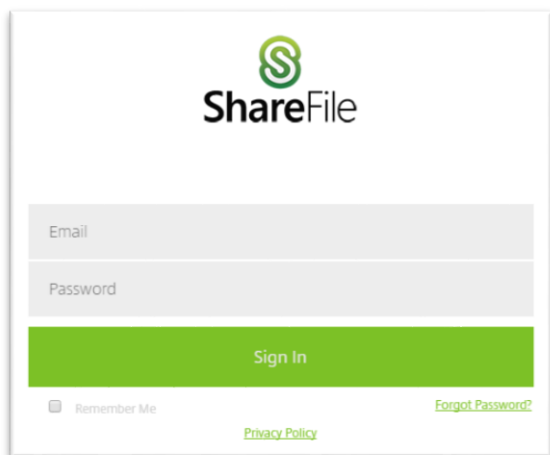
Here are five basics of ShareFile to help you get started accessing, downloading and uploading files faster as a Client user.

ShareFile recently unveiled some new and exciting changes. [Click here](#) for more information about New ShareFile and UI improvements.

## How to log in

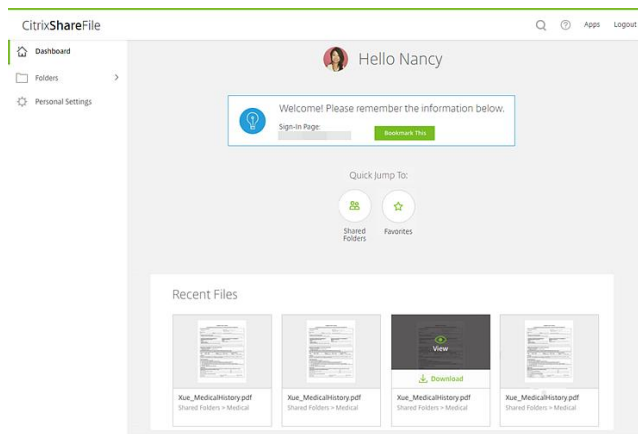
1. Enter the URL of the company's ShareFile account in the form of 'wm-cpa.sharefile.com' in any Web browser. The subdomain is usually the company's name.
2. Enter your username as your email address associated with the account.
3. Enter your password, and click **Log In**. You will be taken to the Dashboard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

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



## 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.



## Still need help?

Search through and access hundreds of support articles at the [ShareFile Knowledge Base](#), or connect with other ShareFile customers at the [ShareFile Community site](#).

## How to upload files in your account

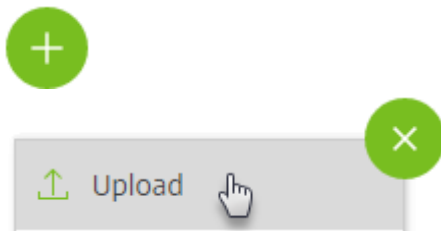
1. You may only upload files to folders where you have been given the **Upload** permission.

**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.

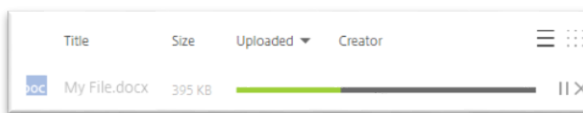
Since you are a client user, your folder will be located in the **Shared Folders** section of the account. (If you do not have folders to access, no folders have been shared with you.)

3. Access the green 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.



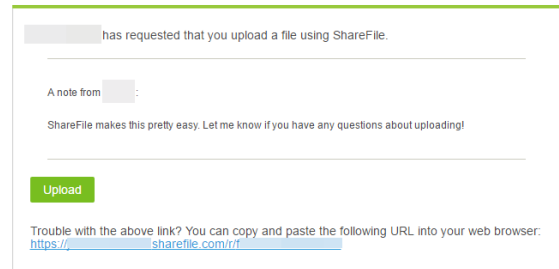
## Still need help?

Search through and access hundreds of support articles at the [ShareFile Knowledge Base](#), or connect with other ShareFile customers at the [ShareFile Community site](#).

## 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**.

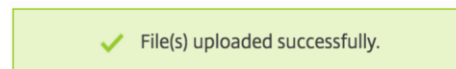
### Citrix ShareFile



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.

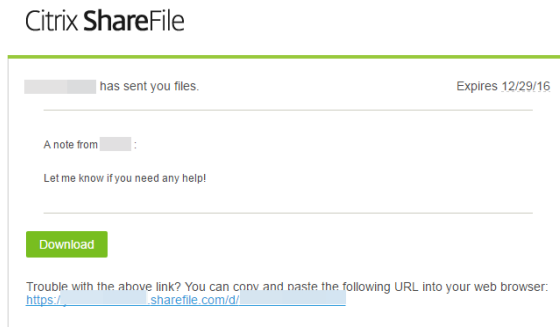
3. When you've placed all files you wish to upload in the box, click **Upload**. A success message will be displayed once your upload is complete.



## 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.



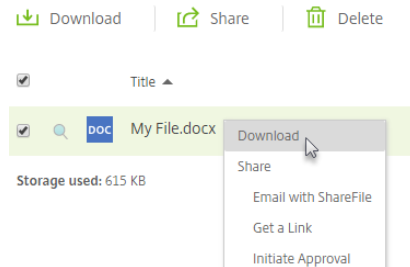
2. On the download page, you can download and preview the file (or files). If you were sent a single file, the file will be displayed in the content viewer. Use the green Download button to download the files.

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

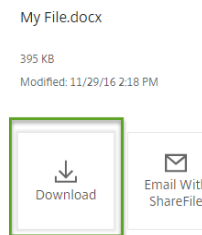
Depending on your browser settings, you may be prompted to select where files should be downloaded to.

## 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.



### About Citrix

Citrix (NASDAQ:CTXS) is a leader in virtualization, networking and cloud services to enable new ways for people to work better. Citrix solutions help IT and service providers to build, manage and secure, virtual and mobile workspaces that seamlessly deliver apps, desktops, data and services to anyone, on any device, over any network or cloud. This year Citrix is celebrating 25 years of innovation, making IT simpler and people more productive with mobile workstyles. With annual revenue in 2013 of \$2.9 billion, Citrix solutions are in use at more than 330,000 organizations and by over 100 million people globally. Learn more at [www.citrix.com](http://www.citrix.com).

© 2015 Citrix Systems, Inc. All rights reserved. Citrix and ShareFile are trademarks of Citrix Systems, Inc. and/or one or more of its subsidiaries, and may be registered in the U.S. Patent and Trademark Office and in other countries. All other trademarks are the property of their respective owners.