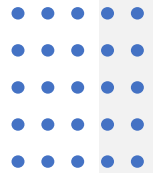




ShareFile User Guide



ShareFile is a way for us to securely share information with each other. We hope these step-by-step instructions help you feel more comfortable with this tool. If you run into any issues or have any questions, please do not hesitate to call us at (415) 472-7300.

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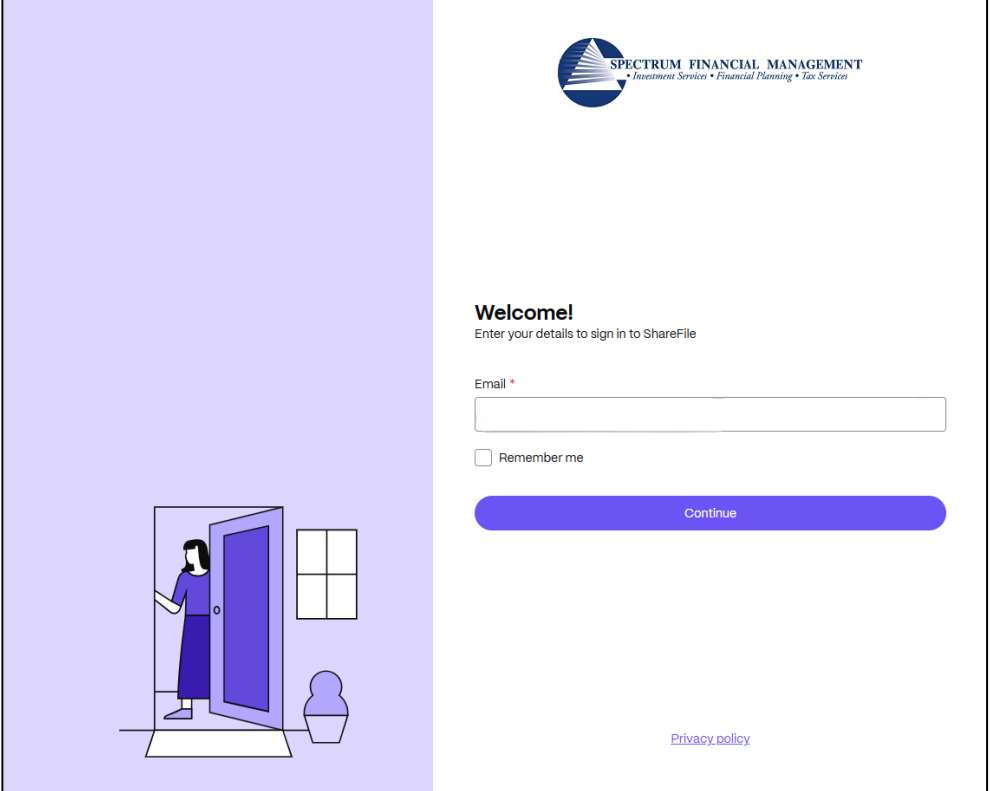
How do I log in to ShareFile?

1. Go to spectrumfinancialmgmt.sharefile.com in your web browser

- a. We recommend bookmarking this web page for easy access
- b. Press Ctrl + D to add to Bookmarks

2. Enter your username and password

- a. Your username is the email address you used to set up your account
- b. If you cannot remember your password, call our office and we will send you a password reset link



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Welcome!
Enter your details to sign in to ShareFile

Email *

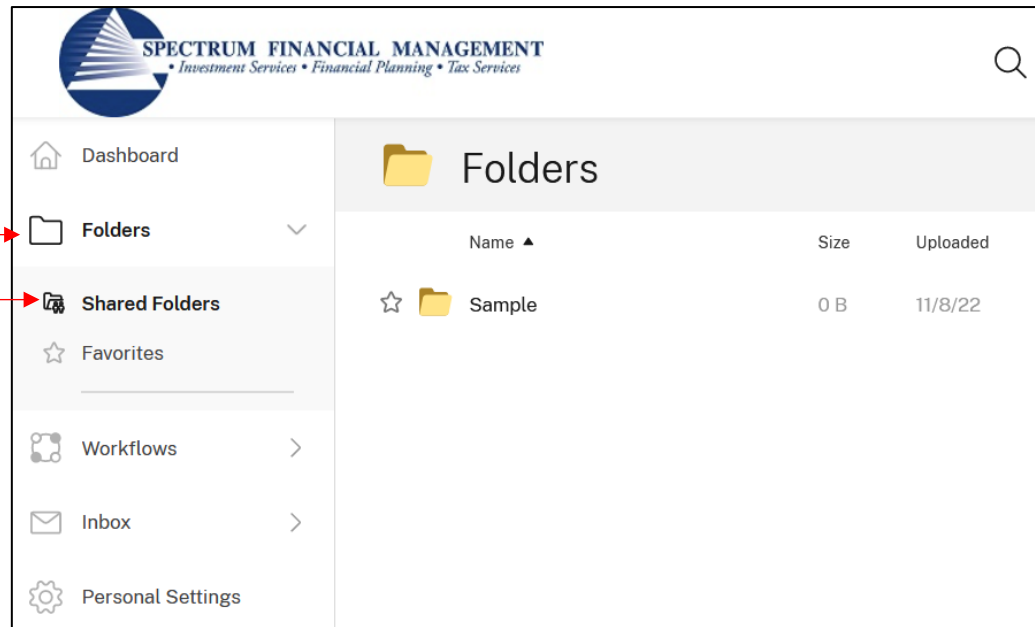
Remember me

Continue

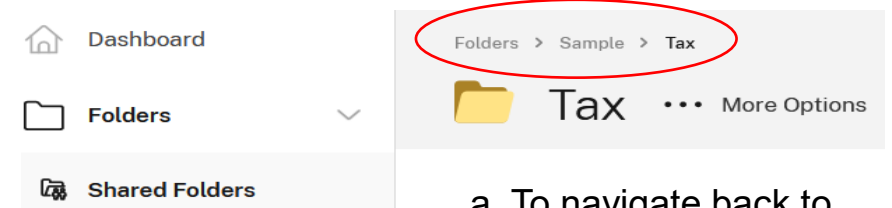
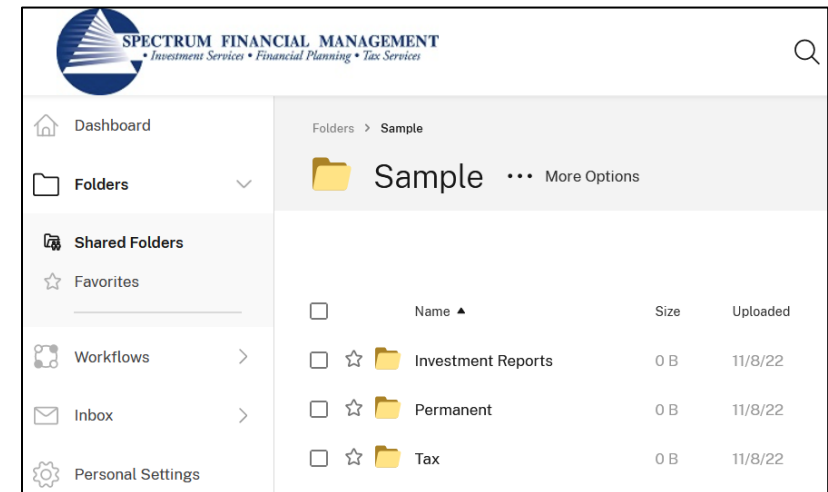
[Privacy policy](#)

How do I access shared documents?

1. Select **Folders** from the menu on the left side of your screen and select **Shared Folders**



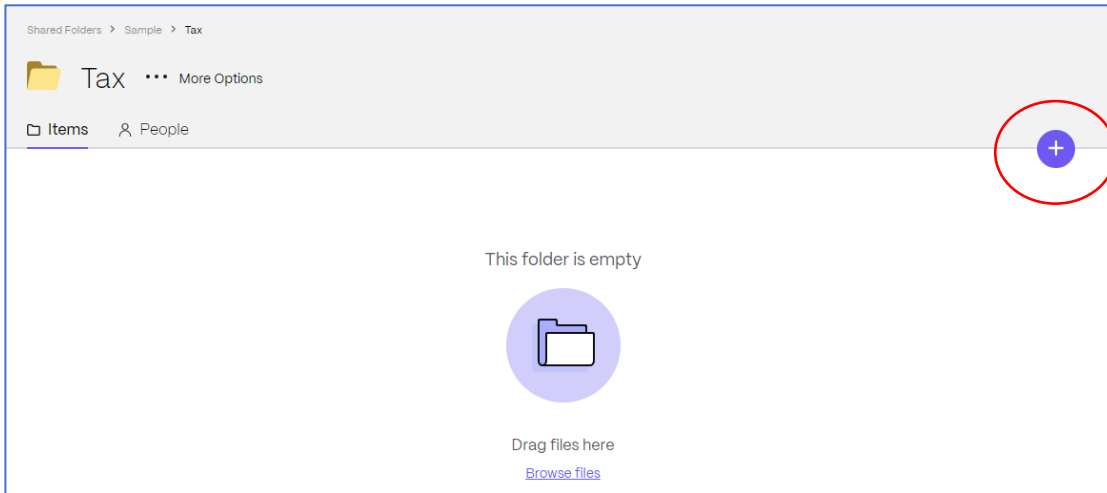
2. Select a folder to view documents and subfolders



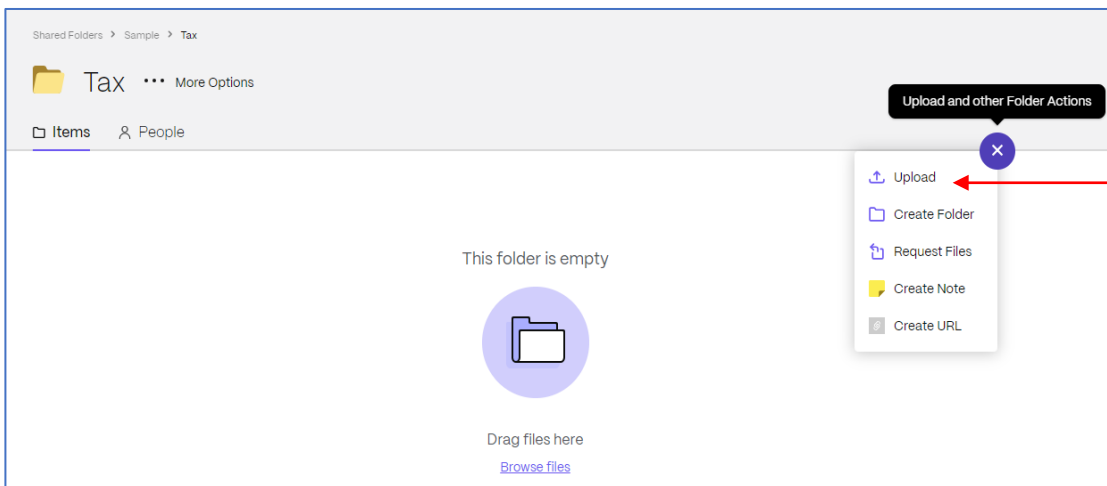
a. To navigate back to previous folders, select the name of the folder from the navigation bar

How do I upload a file?

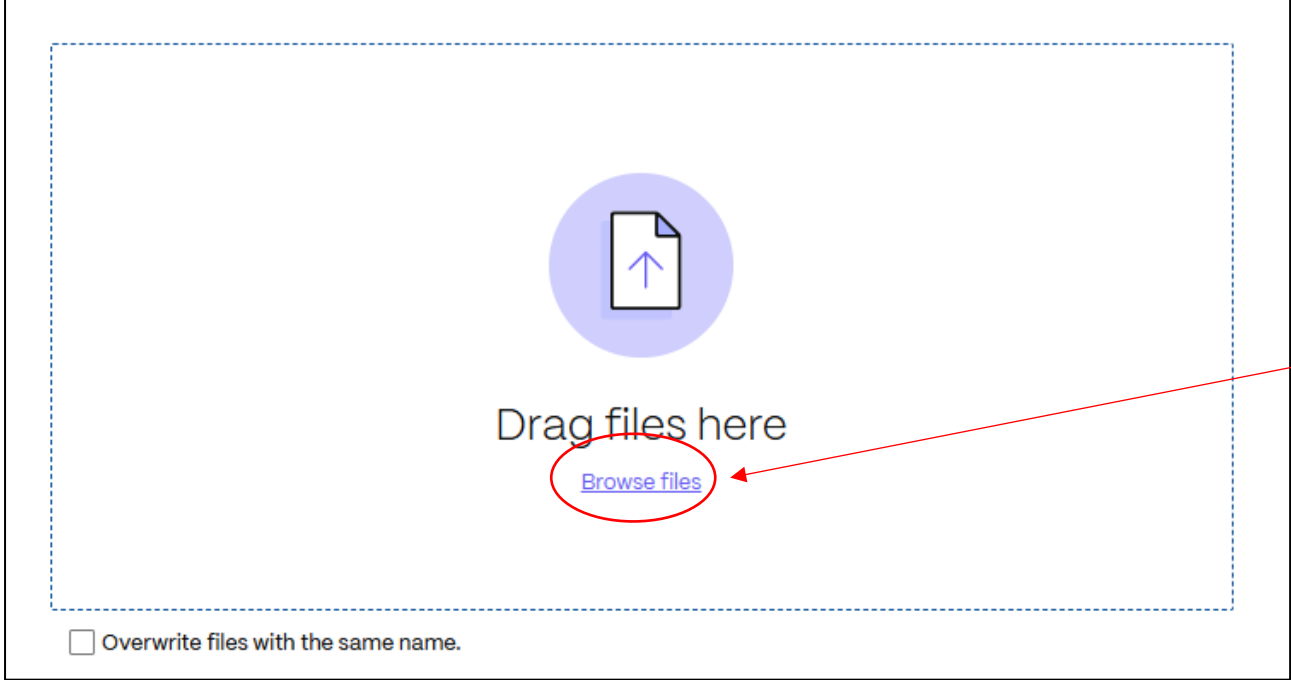
1. Navigate to the folder where you'd like to upload a file (see steps 1-2 on page 4)



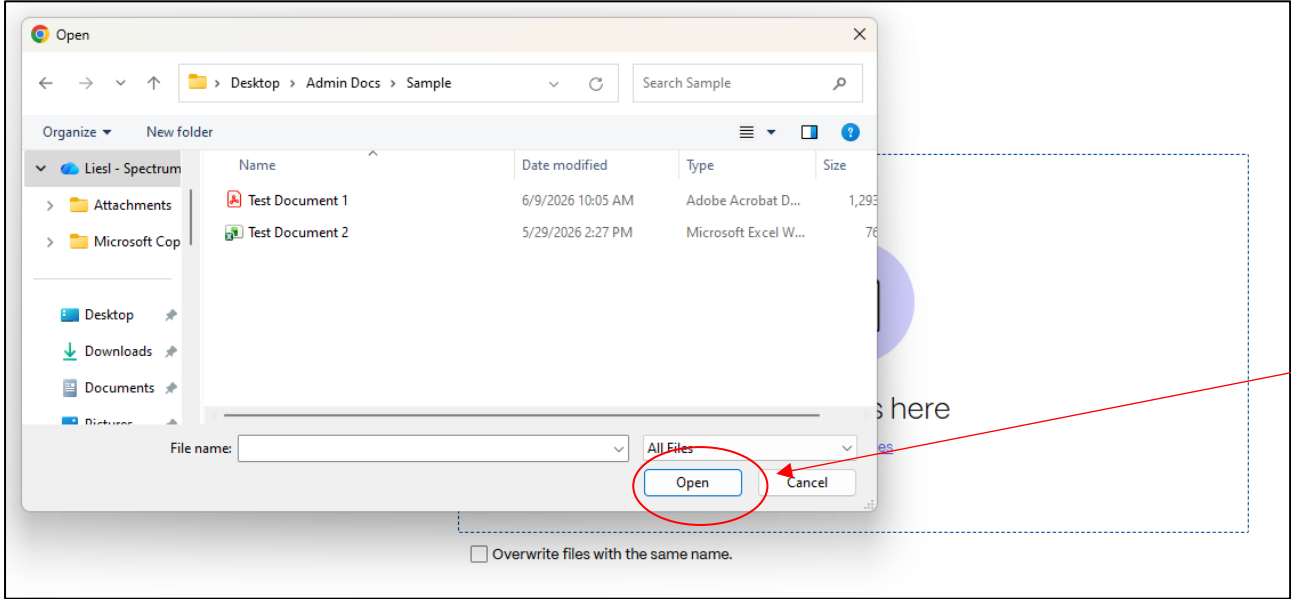
2. Run your mouse over the + button on the right side of your screen



3. Select **Upload** from the drop-down menu



4. Select **Browse files** to access files saved on your computer



5. Select the file(s) that you would like to upload and click **Open**

Upload to "Sample"

2 Items Clear all + Add more

| | | | |
|---|----------------------|---------|----------------------|
| × | Test Document 1.pdf | 1.26 MB | Edit |
| × | Test Document 2.xlsx | 75.8 KB | Edit |

Overwrite files with the same name.

Upload

Cancel

6. Once all files are selected, click the **Upload** in the bottom left of your screen

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Search

Shared Folders > Sample > Permanent

Permanent

Items People

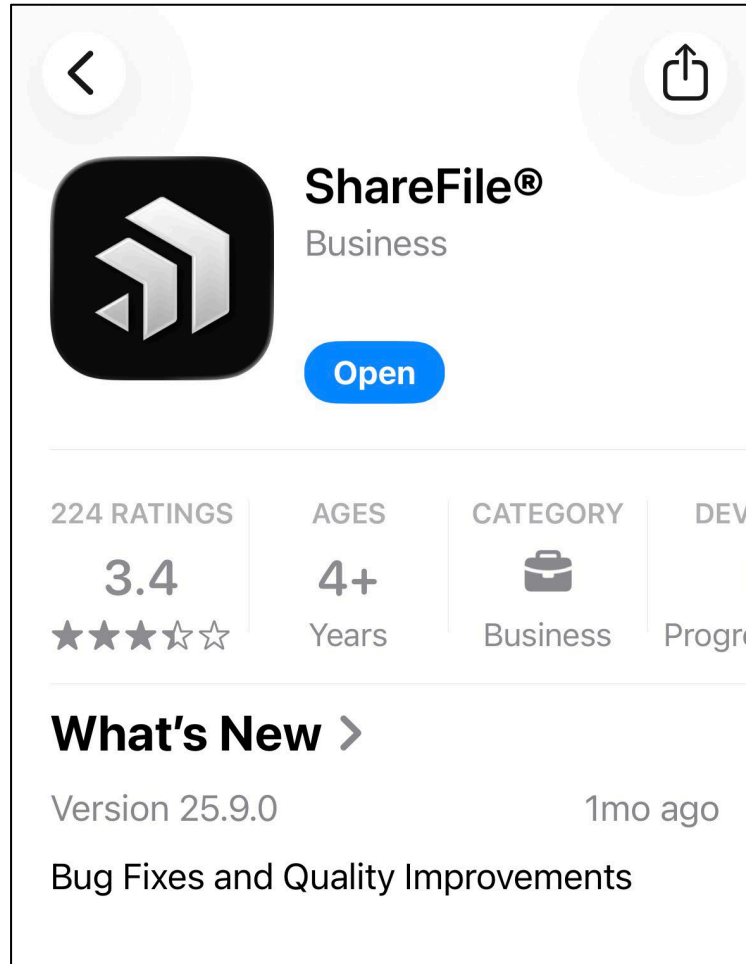
| <input type="checkbox"/> | Name ▲ | Size | Last modified | Creator | ⋮ |
|--------------------------|----------------------|-------|---------------|----------|---|
| <input type="checkbox"/> | Test Document 1.pdf | 1 MB | 3:02PM me | S. Admin | |
| <input type="checkbox"/> | Test Document 2.xlsx | 76 KB | 3:01PM me | S. Admin | |

Email me when a file is: Downloaded from this folder Uploaded to this folder

7. The upload is complete once the upload bar reaches 100% and there is a time indicated under the **Uploaded** column

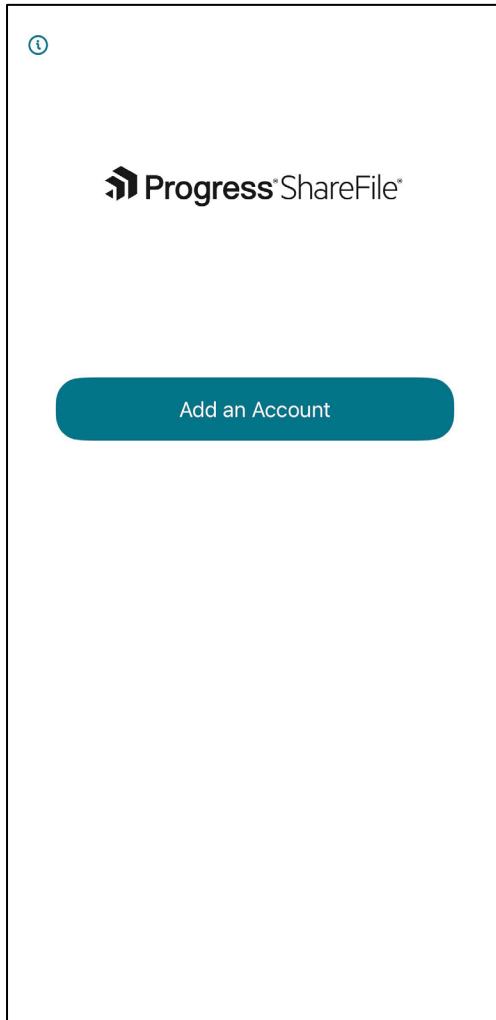
How do I upload a picture from my phone or tablet?

1. Download the **ShareFile** app

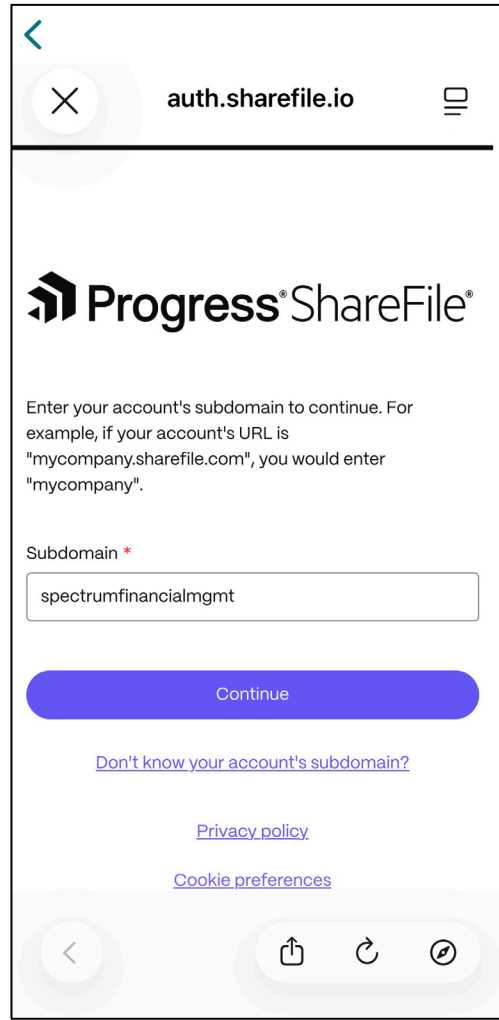


2. Log in to your ShareFile account on the Citrix Files app

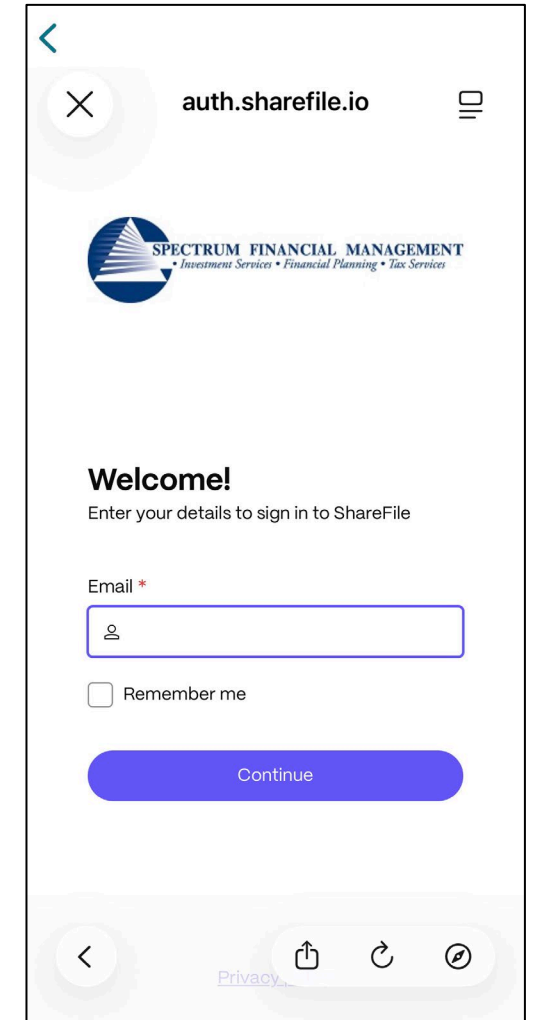
a. Select **Add an Account**



b. Enter "spectrumfinancialmgmt" as the subdomain

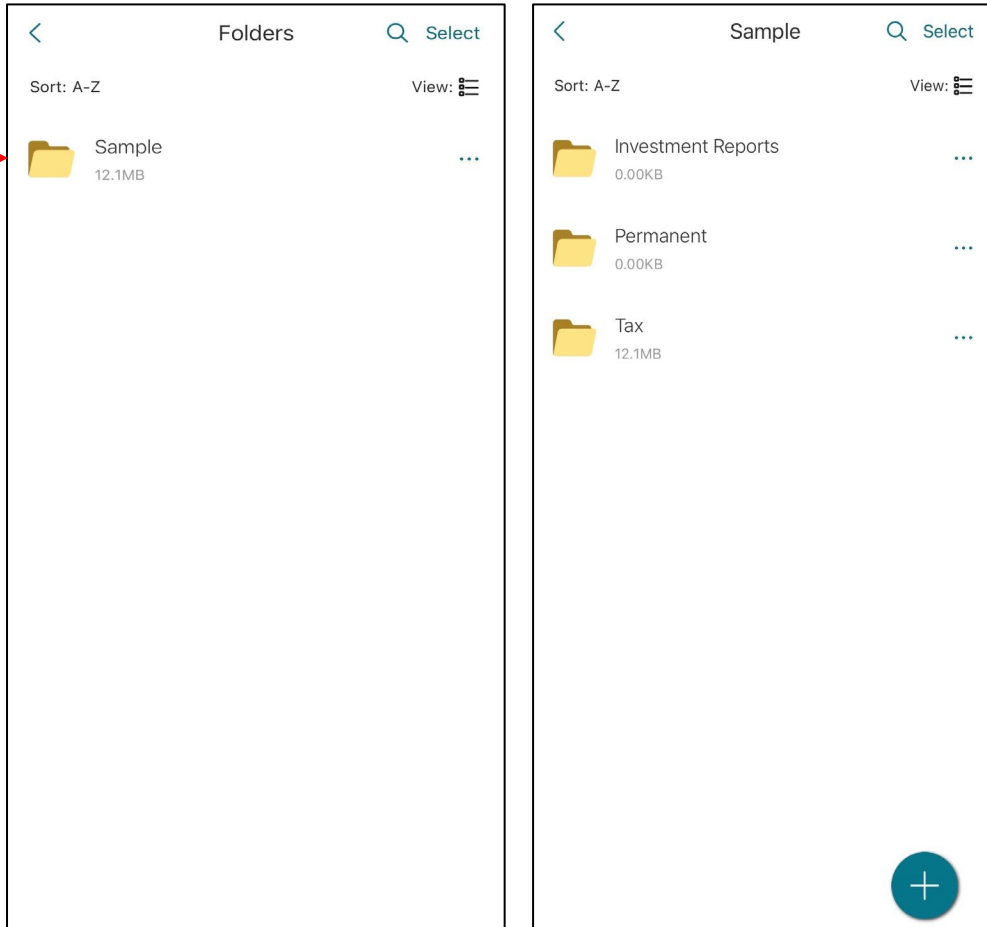


c. Enter your username and password

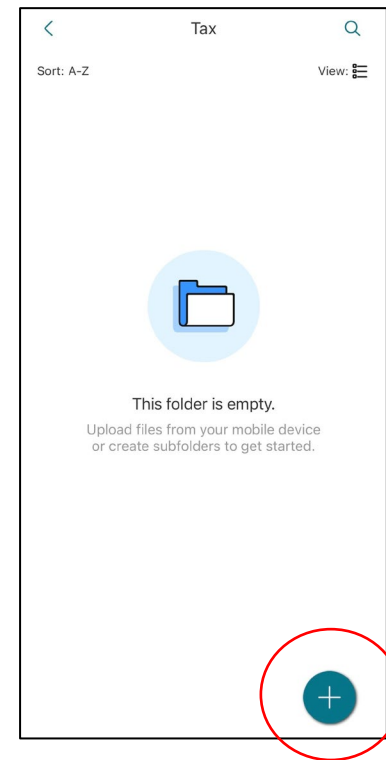


3. Select your folder to view and access subfolders

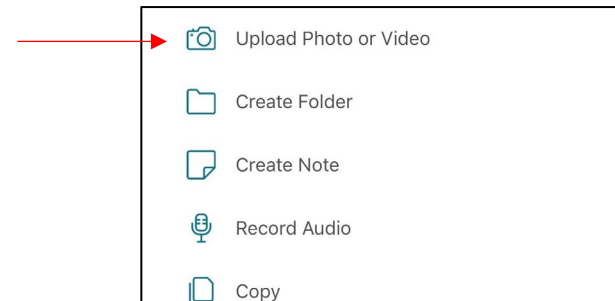
a. Select the subfolder where you'd like to upload a file



4. Select the + in the bottom right of your screen



5. Select Upload Photo or Video



6. Take a photo of your document or upload a photo of it from your camera roll and select **Next**



Tips for taking a photo of your document:

- Lay the document flat
- Make sure the document is well lit and avoid shadows
- Tap your screen to focus on the document
- Confirm the entire document is captured in the photo (retake from a higher angle if necessary)

< Upload Cancel

Name: Tax document 2022

Details:

Destination: Tax Edit

Upload

7. Enter a name for your document

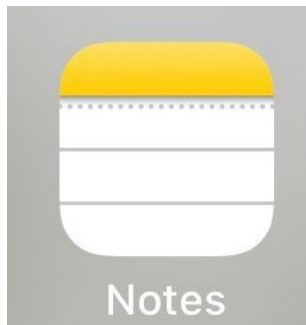
8. Select **Upload** to finish

How do I scan a document with my phone or tablet and upload to ShareFile?

(directions are specific to iPhone and iPad capabilities)

1. Complete Steps 1 - 2 from “How do I upload a picture from my phone?” (page 8-10)

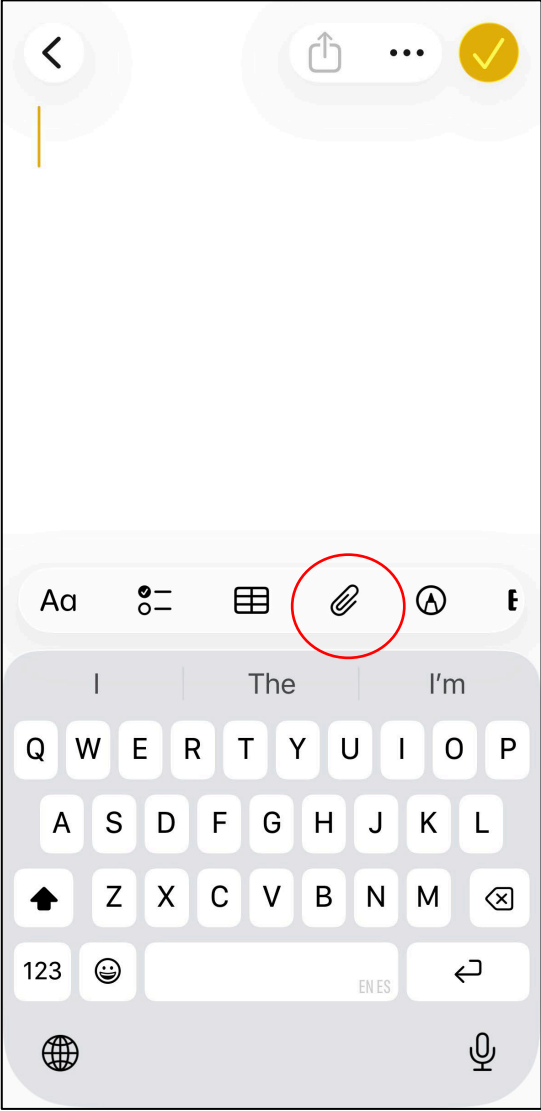
2. Open the **Notes** application on your device



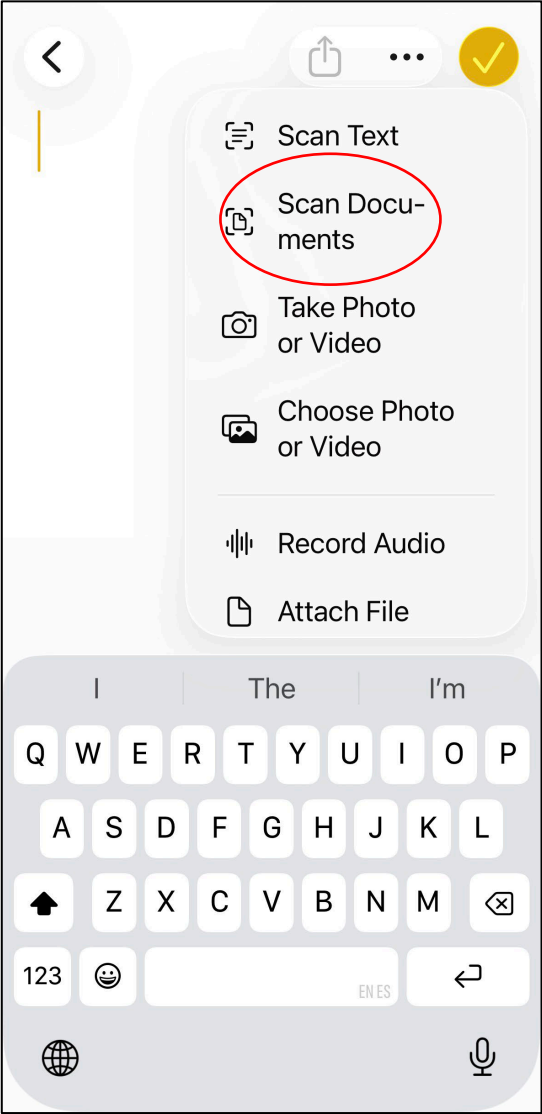
3. Select the pen and paper icon on the bottom right of your screen to create a new note



4. Select the paperclip icon located above the keyboard



5. Select **Scan Documents** from the pop-up menu



6. Hover your device over the document as if you were taking a photo (The yellow frame indicates the portion being scanned, be sure your entire document is within the yellow frame)

a. To capture the scan:

i. Hold your phone in the scanning position for 3 seconds, then tap the yellow arrow check mark

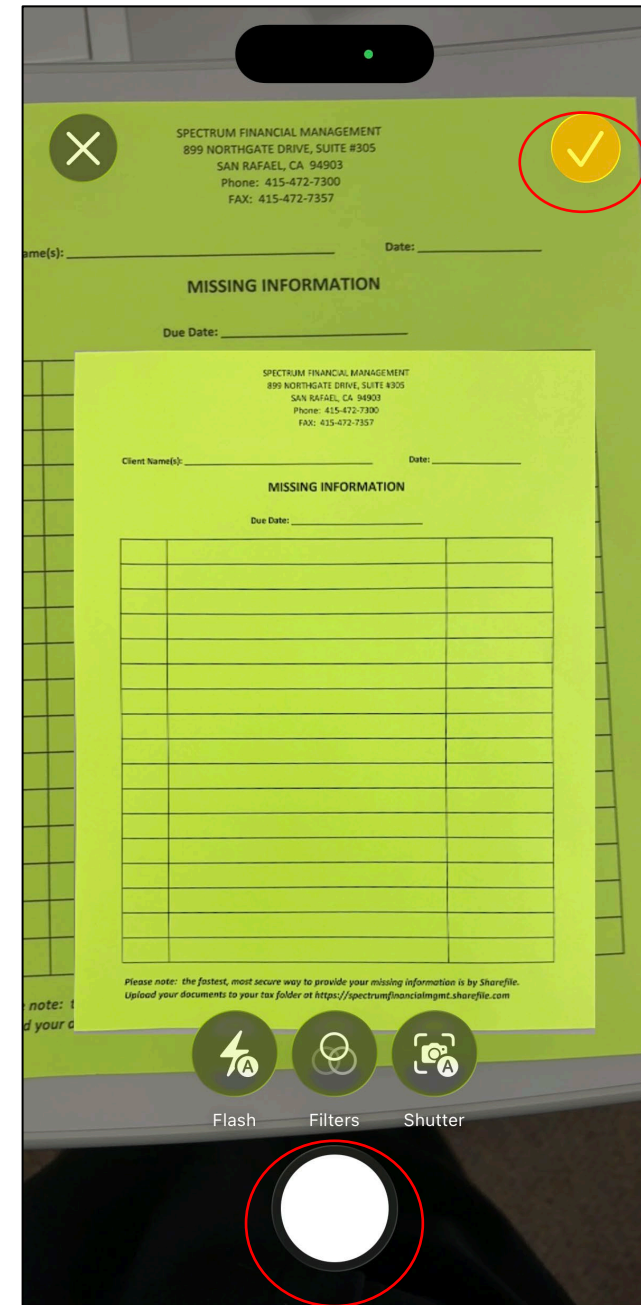
OR

ii. Tap the white circle at the bottom of your screen

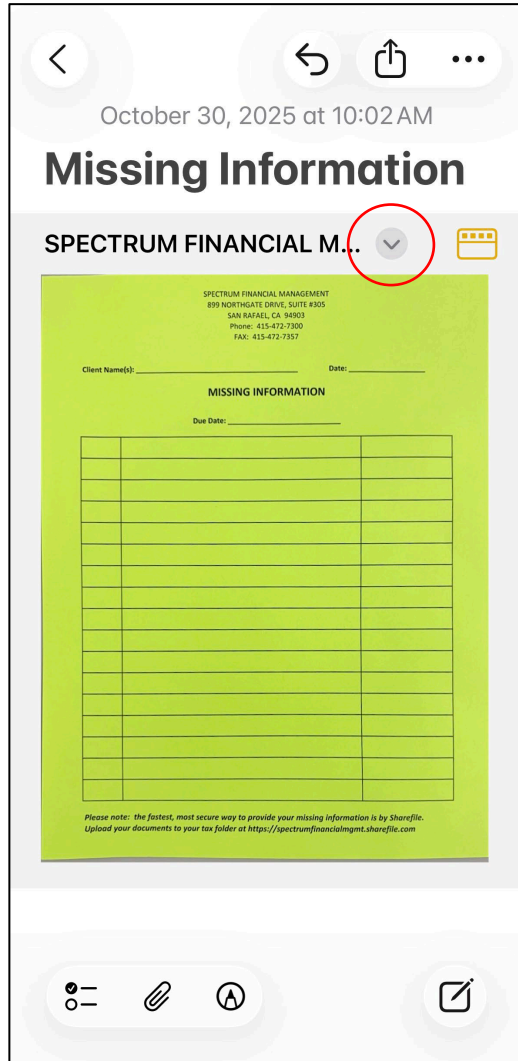
b. If your document has multiple pages, continue to scan each page one at a time

i. When you finish scanning a page, it will automatically save and collect at the bottom left of your screen

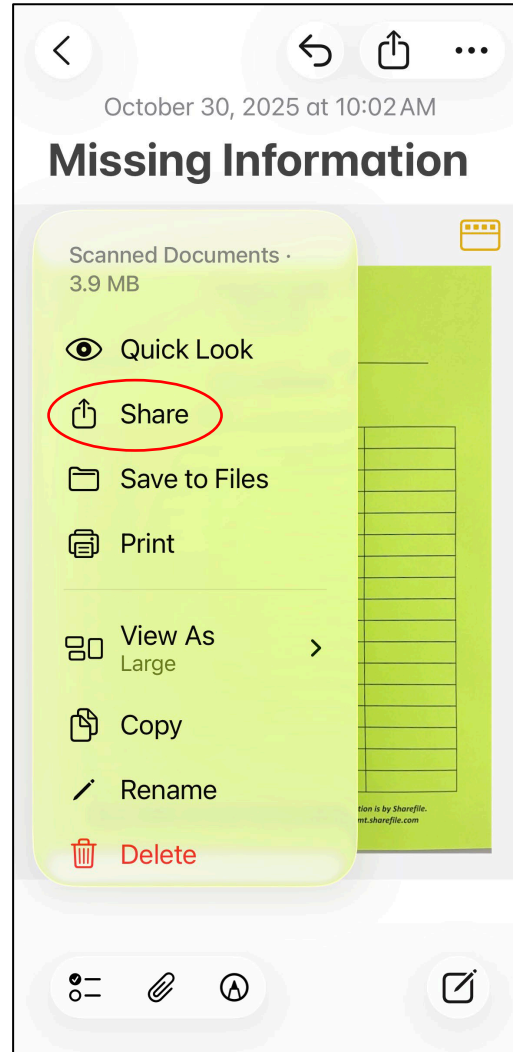
ii. Your scanned pages will combine into one document



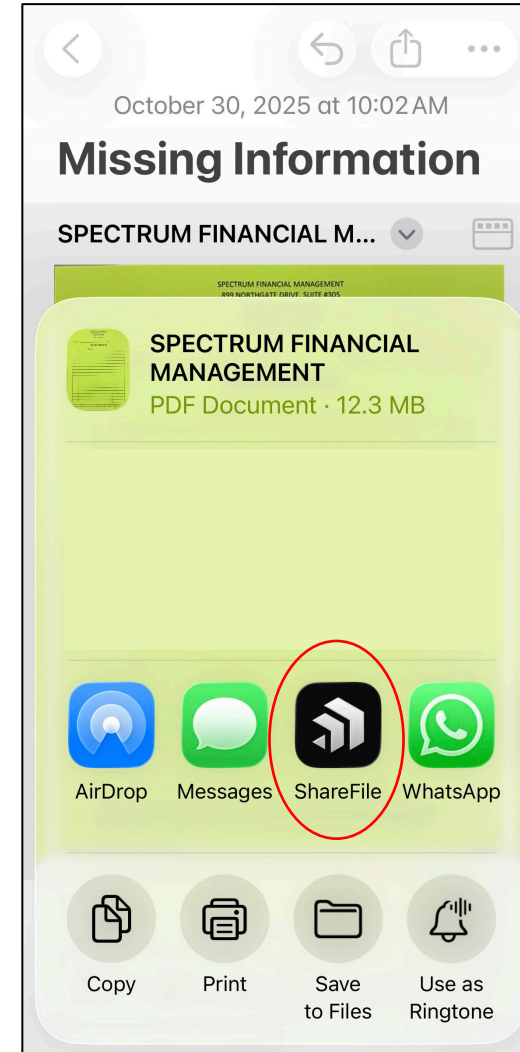
7. Select the small down arrow button



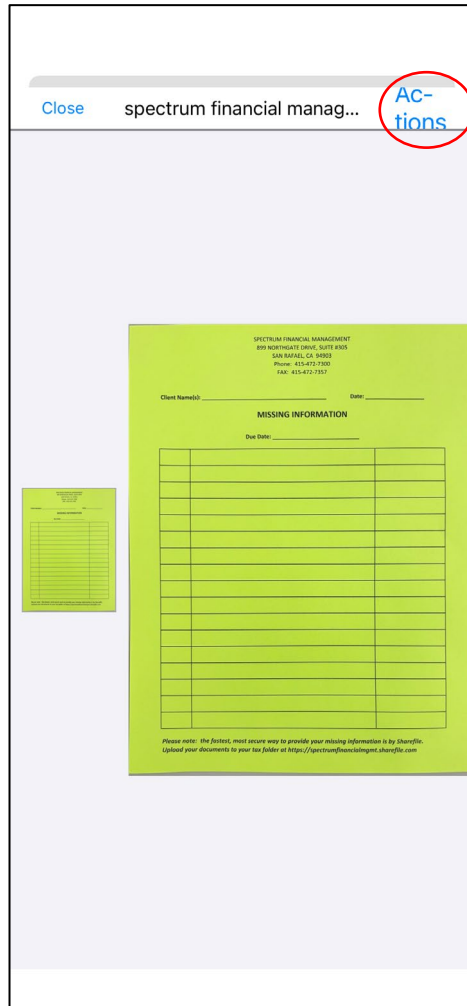
8. Select **Share**



9. Select the ShareFile icon from the row of applications (you may have to scroll to the right until you see the application)



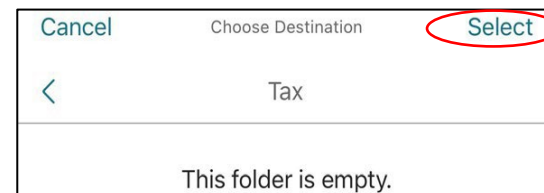
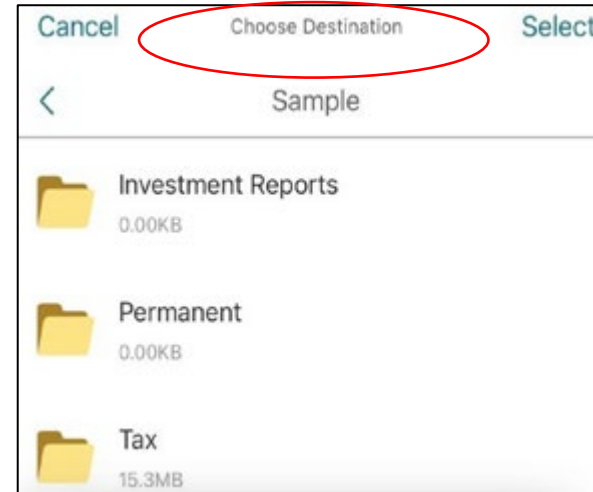
10. Select **Actions**



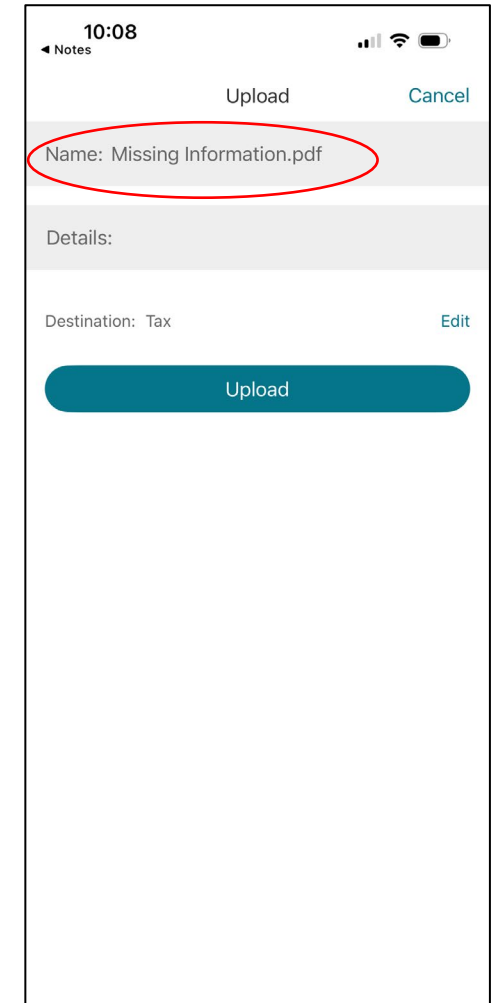
11. Select **Save** (You will automatically be taken to the ShareFile app)



12. Choose which folder destination and hit select



13. Enter a name for your document and Select the **Upload** button



How to set up multi-factor authentication on your account

1. Select **Personal Settings**
2. Scroll down to Sign in options
3. Select **Manage multi-factor**

The screenshot displays the user interface for Spectrum Financial Management. The top navigation bar includes the company logo, a search bar, and links for Help, Catalog, Apps, and Log Out. The left sidebar contains a navigation menu with items like Dashboard, Folders, Projects, Workflows, Templates, Signatures, Inbox, and People. The 'Personal Settings' option is highlighted with a red circle. The main content area is divided into sections: Profile (Name, Company, Time format, Date format), Email addresses (Add button), and Sign in options (Choose how to sign in to this ShareFile account). The 'Sign in options' section is circled in red, and the 'Manage multi-factor' link is also circled in red. A red circle with the number '1' and a question mark icon is located in the bottom right corner of the page.

5. Choose which multi-factor authentication method you want
 - a. ShareFile will walk you through each setup procedure

4. Under Methods, Select the **Add** button

Multi-factor authentication [Close]

Methods [Add]

App passwords
For apps that don't support multi-factor authentication, you can create a specific password. [Generate]
You have not generated any app passwords.

Backup codes
Codes that can be used if you lose access to your other methods. [Generate]
You have not generated backup codes.

Add method [Close]

1 Type — 2 Setup — 3 Verify

Choose the type of multi-factor method you would like to add below.

[Authenticator app]

[Phone number]

Examples of authenticator apps

