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
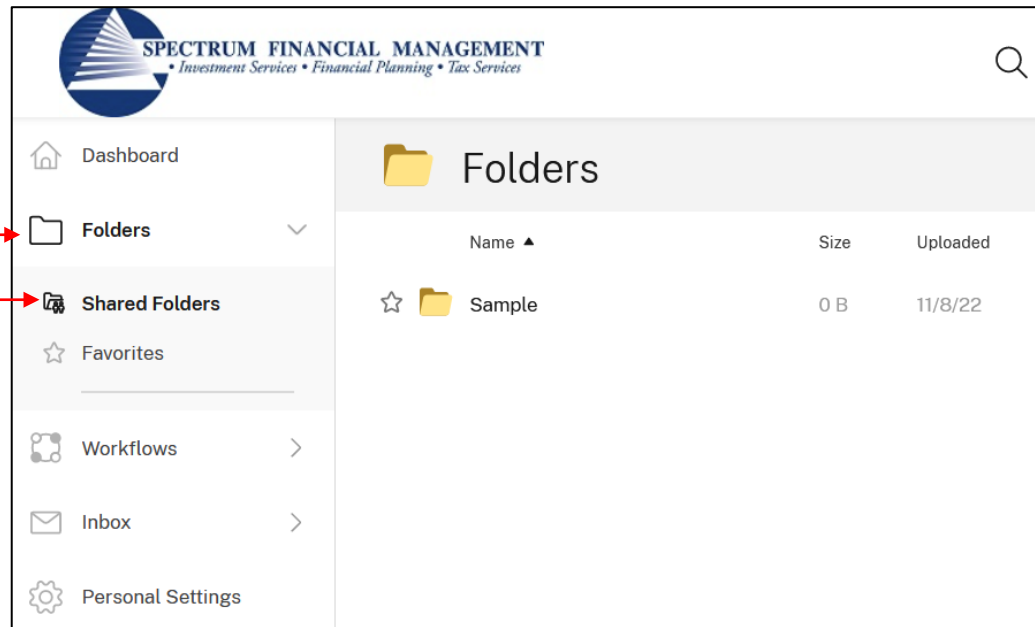
   b.   Press Ctrl + D to add to Bookmarks

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
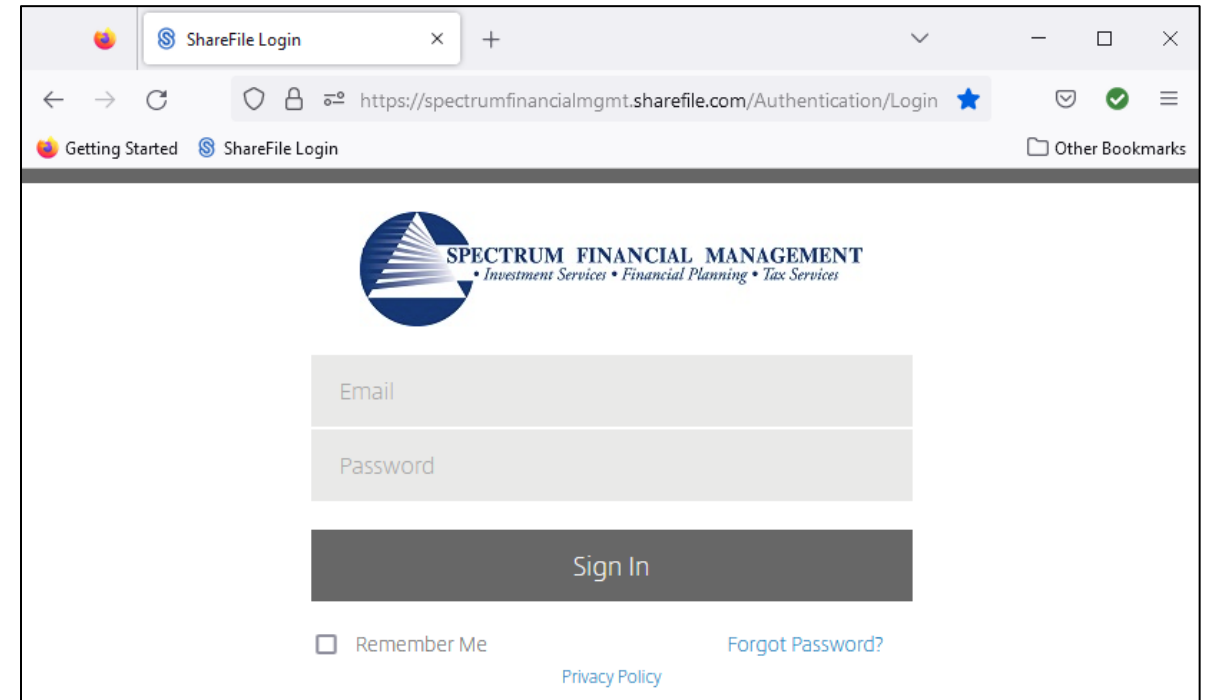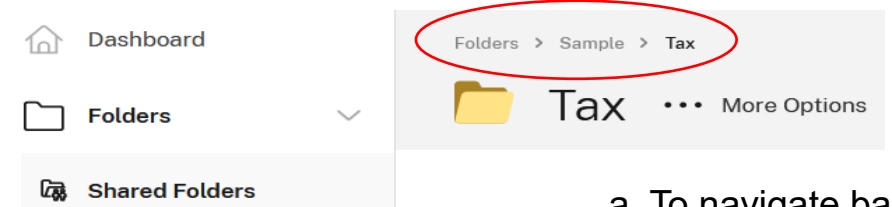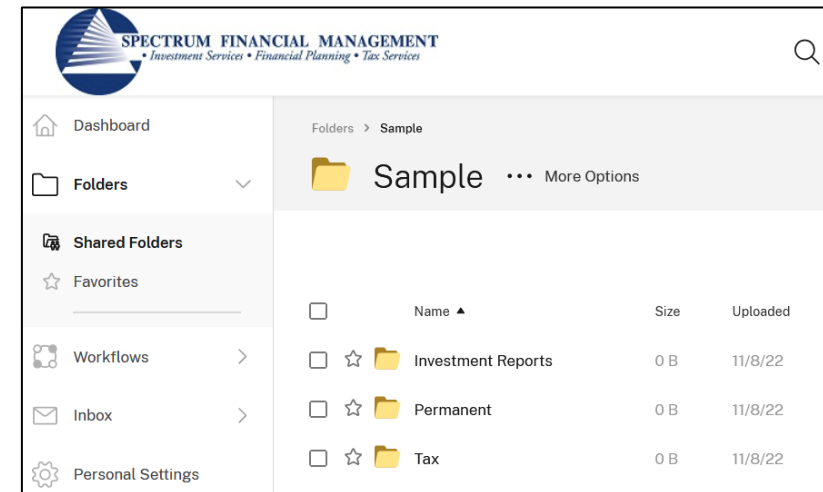
How do I access shared documents?

1. Select **Folders** from the menu on the left side of your screen and select **Shared Folders**
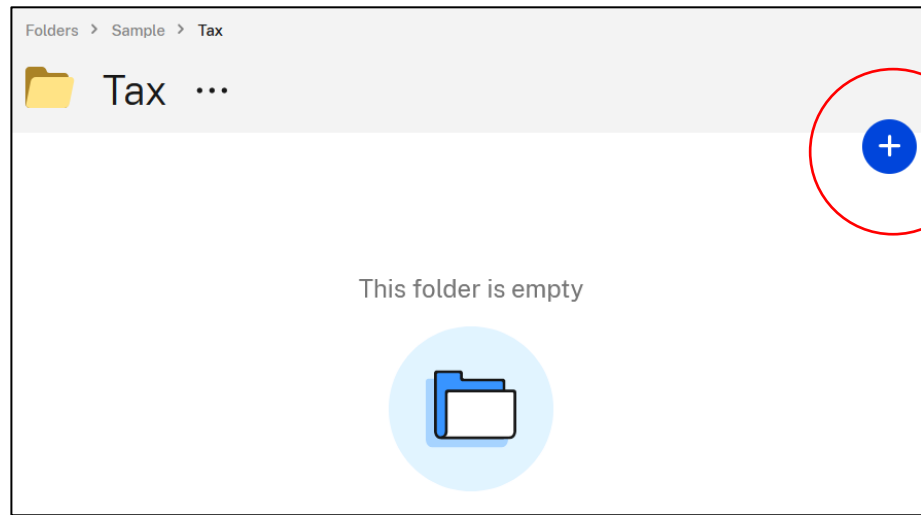
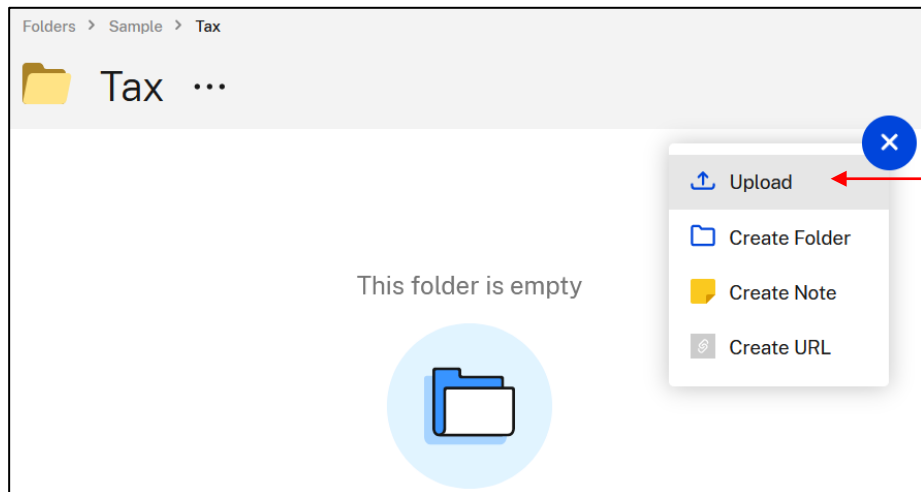2. Select a folder to view documents and subfolders

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. Click the **+** button on the right side of your screen
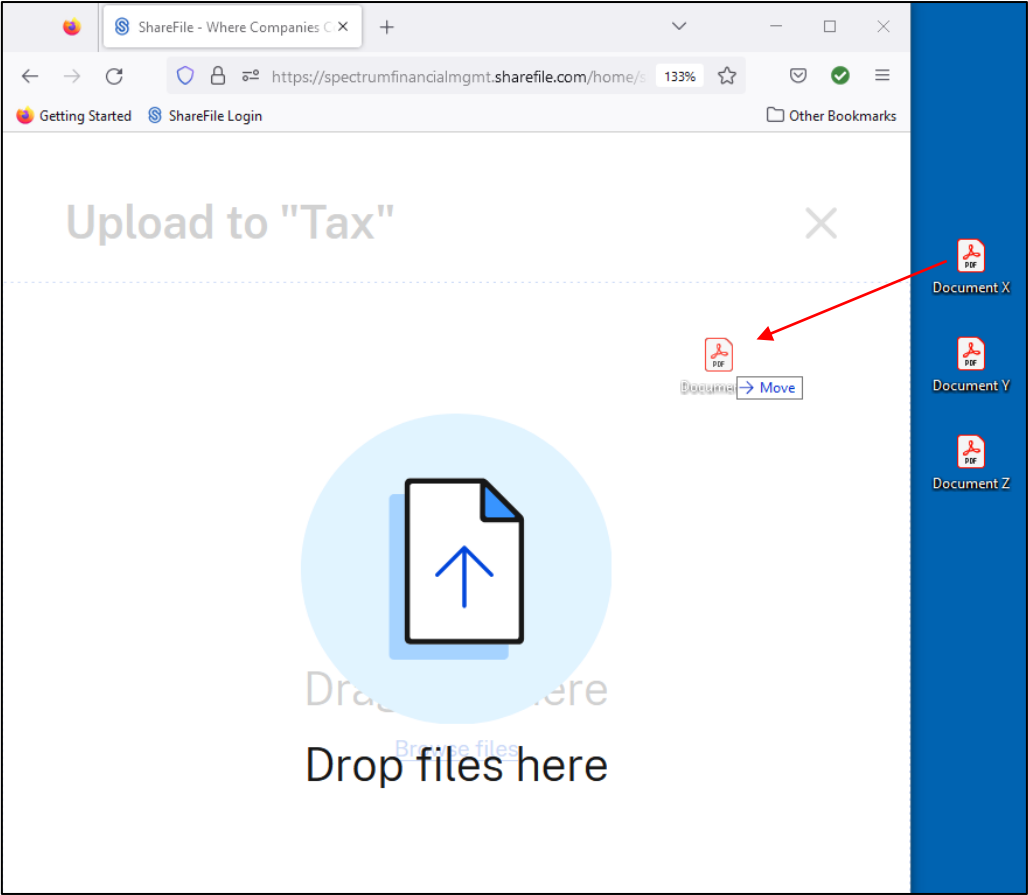

3. Select **Upload** from the drop-down menu

3. To upload the document(s) from your computer:
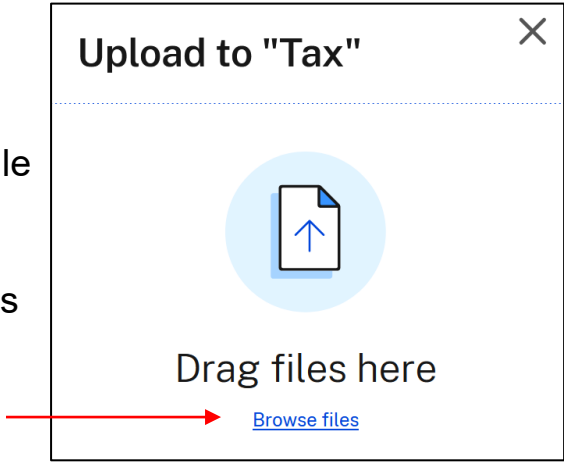
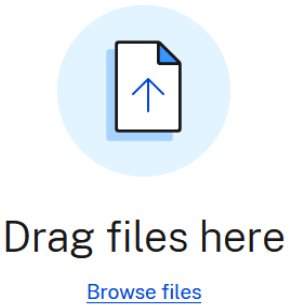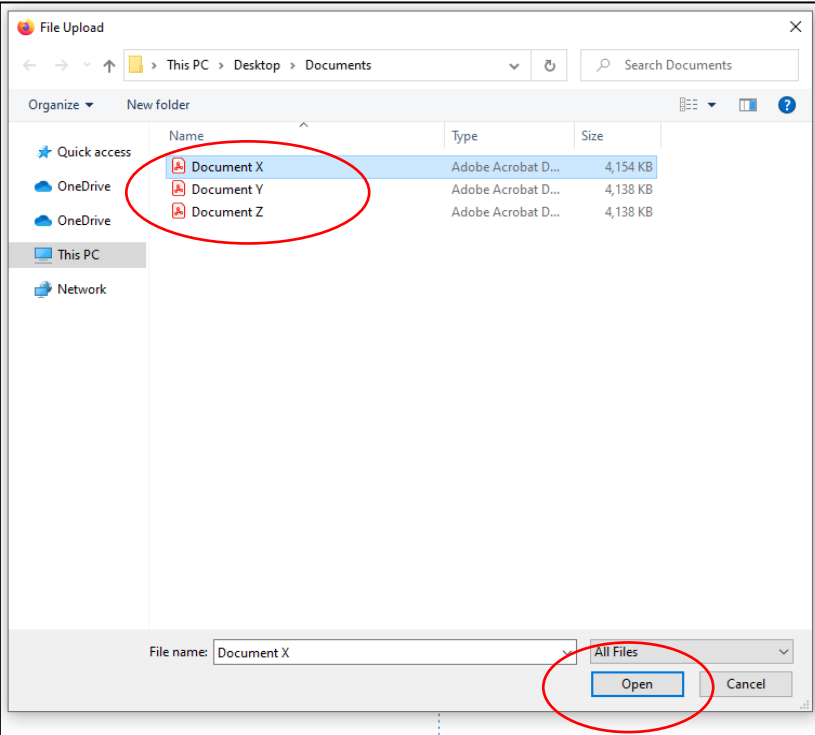a. Drag and drop the file into ShareFile   OR

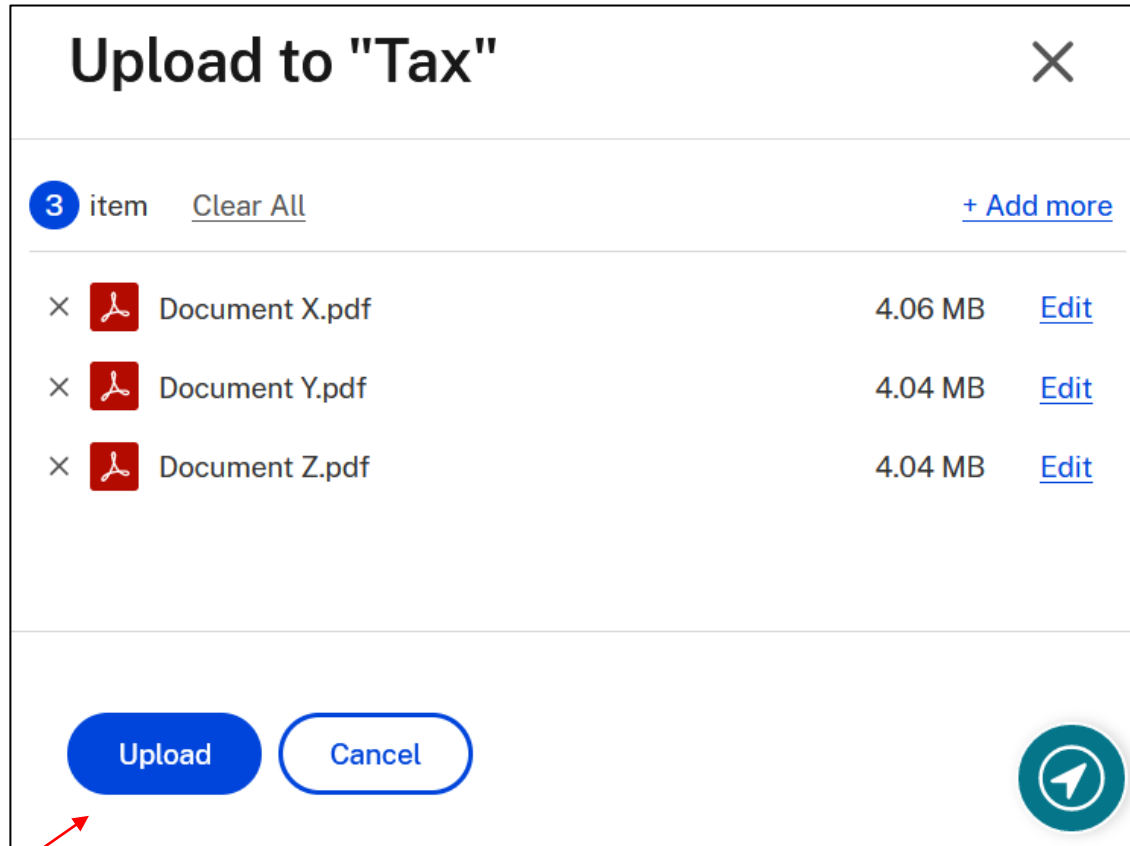b. Browse your computer to select a file

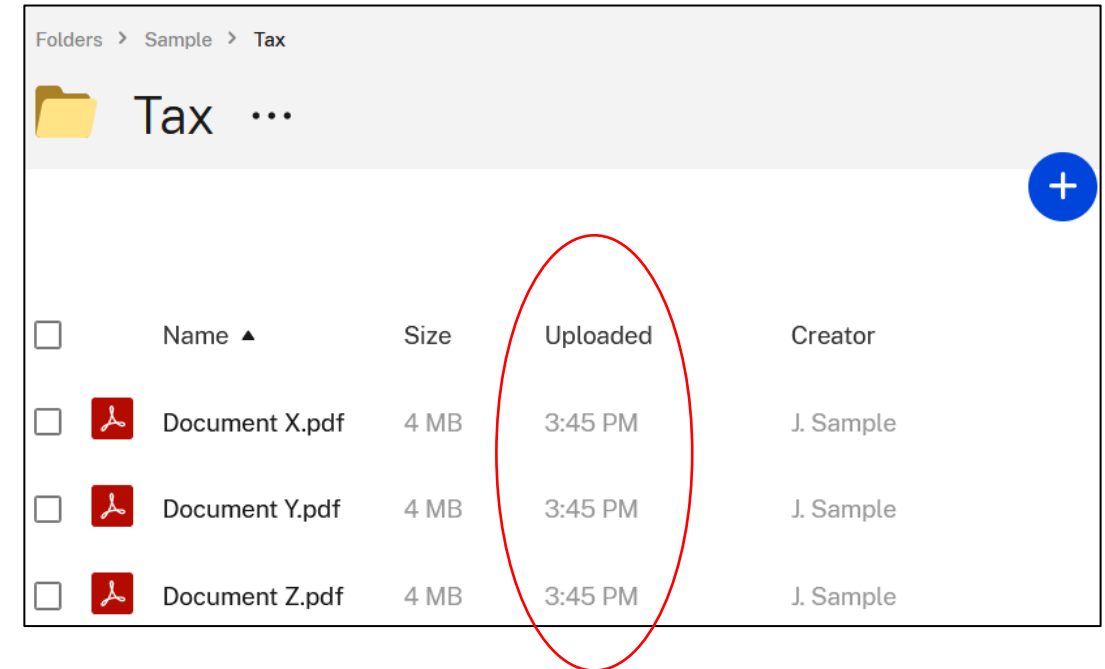i. Select **Browse files** to access files saved on your computer

ii. Select the file(s) that you would like to upload and click **Open** in the bottom right

4. Once all files are selected, click **Upload** in the bottom left of your screen
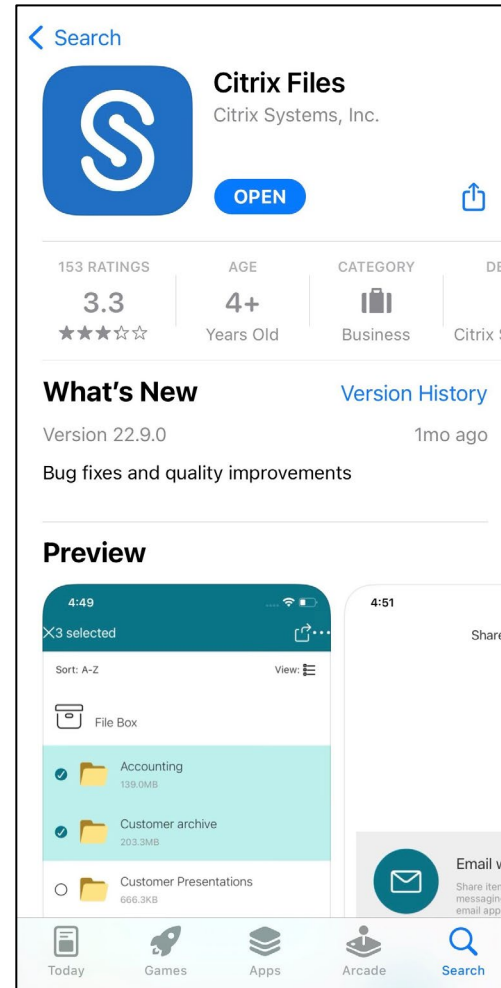
Upload to "Tax"   ✕

3 item   Clear All   + Add more

✕ 📕 Document X.pdf   4.06 MB   Edit

✕ 📕 Document Y.pdf   4.04 MB   Edit

✕ 📕 Document Z.pdf   4.04 MB   Edit

Upload   Cancel   ➤

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

Folders > Sample > Tax

📁 Tax ⋯   +

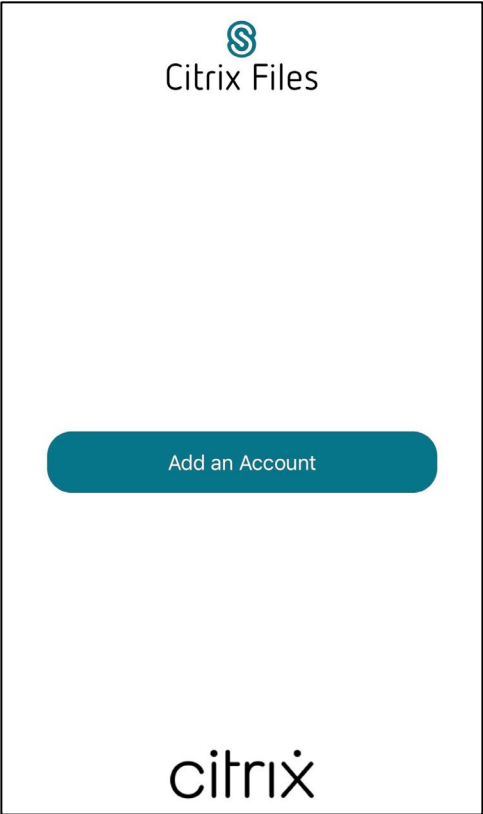|	Name ▲	Size	Uploaded	Creator
☐ 📕	Document X.pdf	4 MB	3:45 PM	J. Sample
☐ 📕	Document Y.pdf	4 MB	3:45 PM	J. Sample
☐ 📕	Document Z.pdf	4 MB	3:45 PM	J. Sample

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

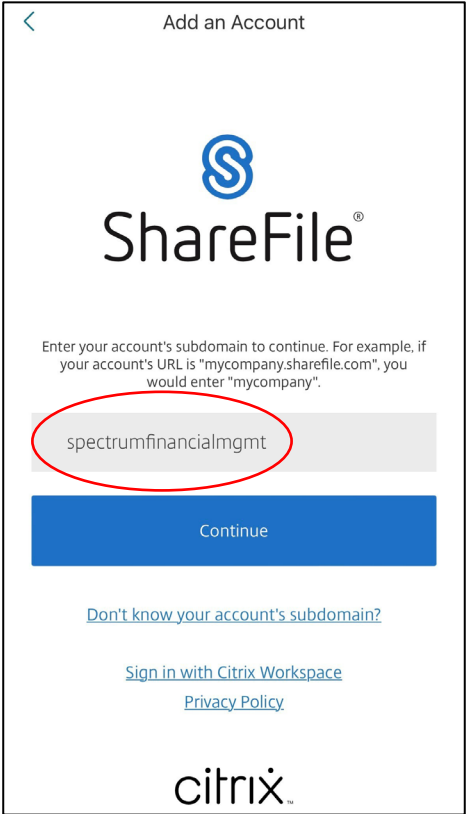1. Download the **Citrix Files** app

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

a. Select Add an Account

b. Enter "spectrumfinancialmgmt" as the subdomain
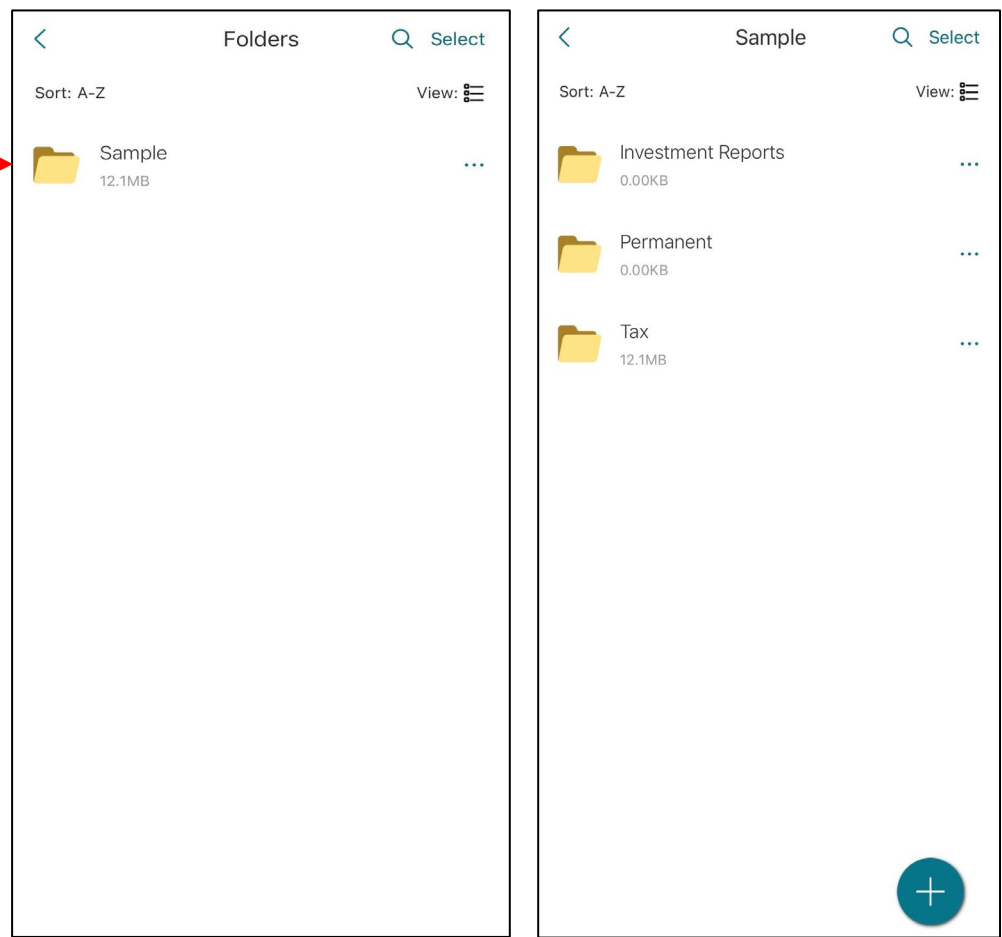

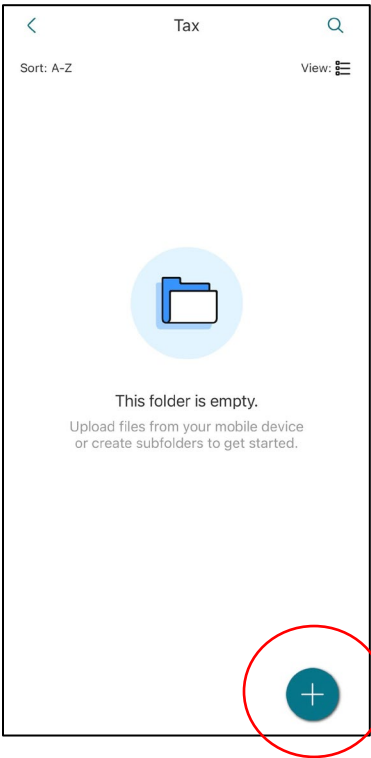**c. Enter your username and password**
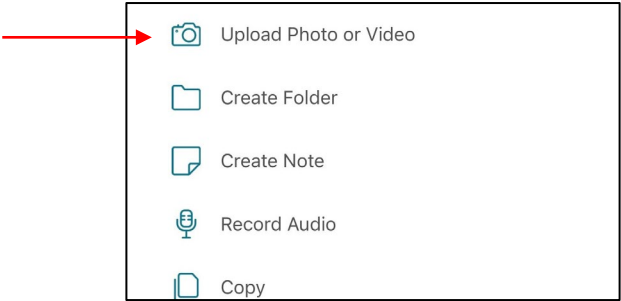
3. Select your folder to view and access subfolders

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

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

Folders screen:
- Sample — 12.1MB

Sample screen:
- Investment Reports — 0.00KB
- Permanent — 0.00KB
- Tax — 12.1MB

Tax screen:
This folder is empty.
Upload files from your mobile device or create subfolders to get started.

5. Select **Upload Photo or Video**

- Upload Photo or Video
- Create Folder
- Create Note
- Record Audio
- Copy

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)

10

<	Upload	Cancel

Name: Tax document 2022 ← 7. Enter a name for your document

Details:

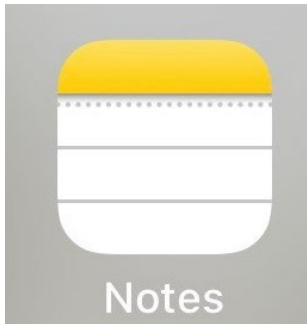Destination: Tax   Edit

Upload ← 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)

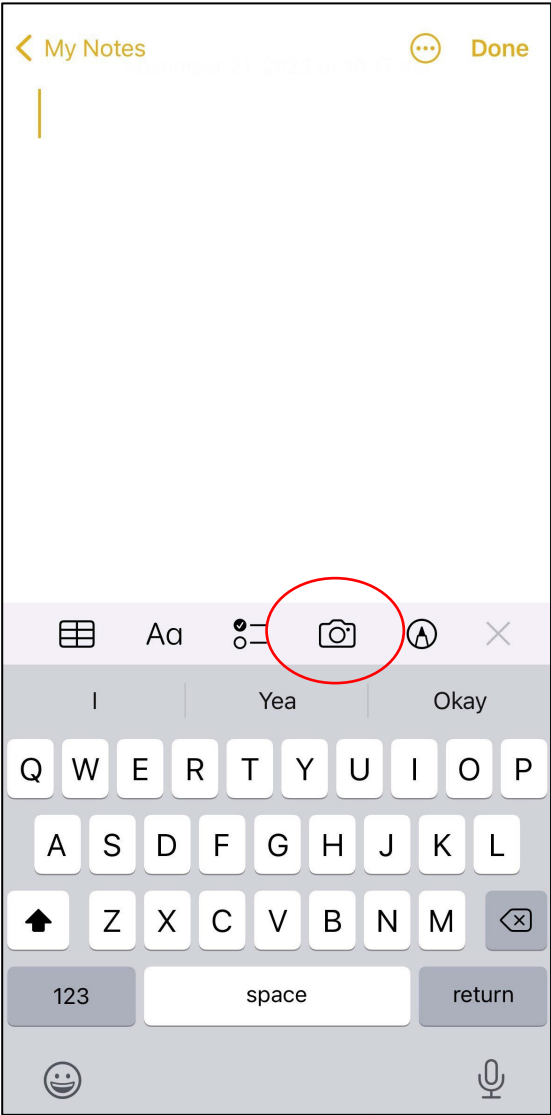1. Complete Steps 1 - 2 from "How do I upload a picture from my phone?" (page 8 - 9)

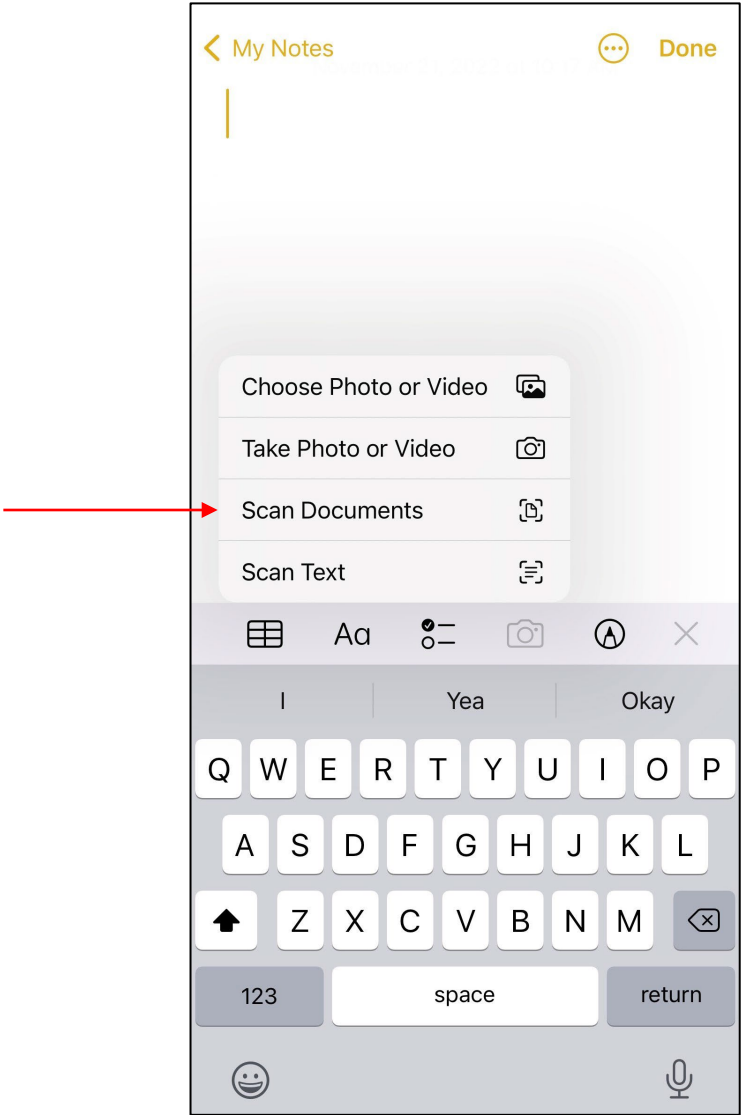3. Open the **Notes** application on your device

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

5. Select the camera icon located above the keyboard

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

7. Hover your device over the document as if you were taking a photo

    a. The yellow frame indicates the portion being scanned (be sure your entire document is within the yellow frame)

    b. To capture the scan:
        i. Hold your phone in the scanning position for 3 seconds

        or

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

    c. 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

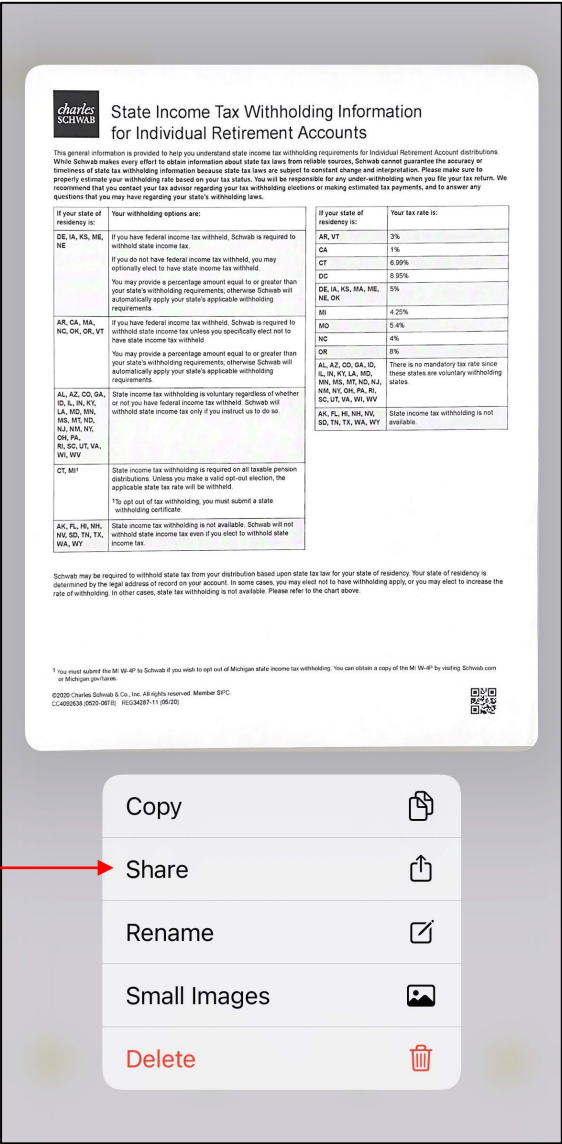   ii. The number of pages scanned and saved are indicated at the bottom right of your screen
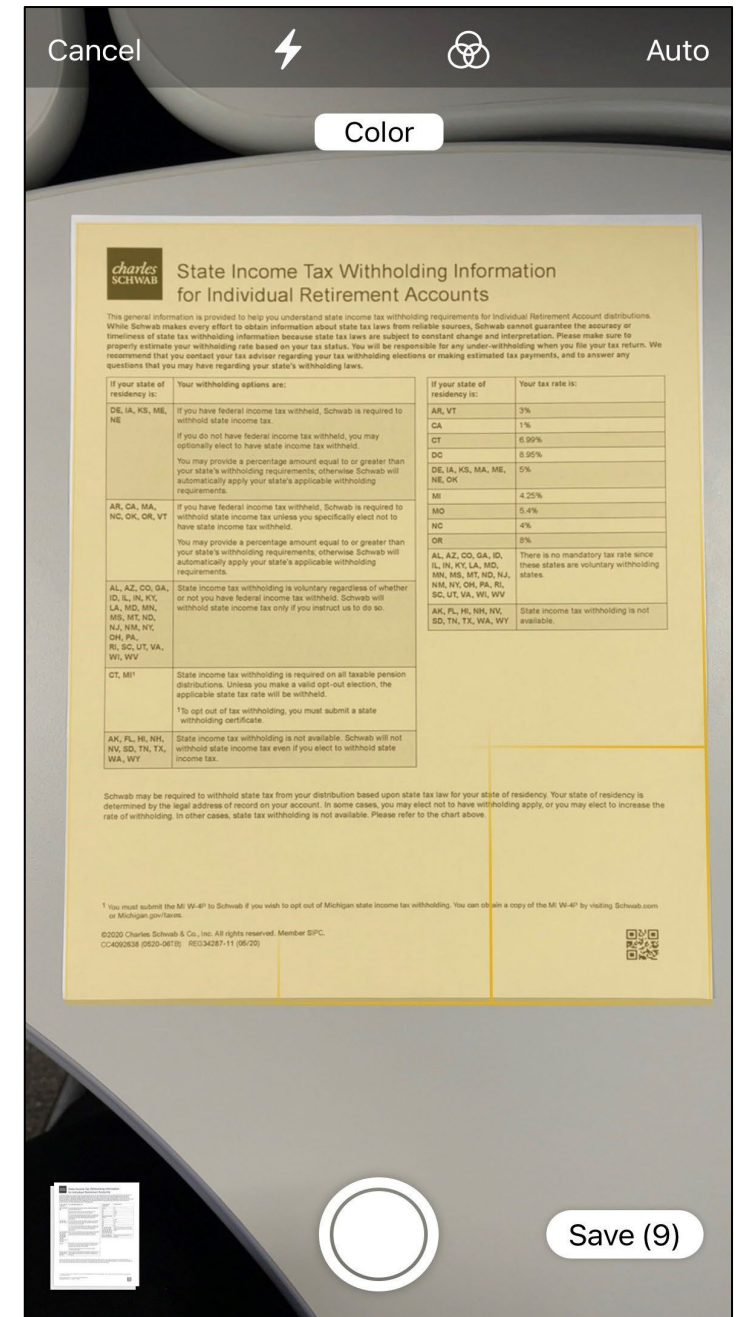
8. Once you've scanned all the pages in your document, select **Save** at the bottom right of your screen
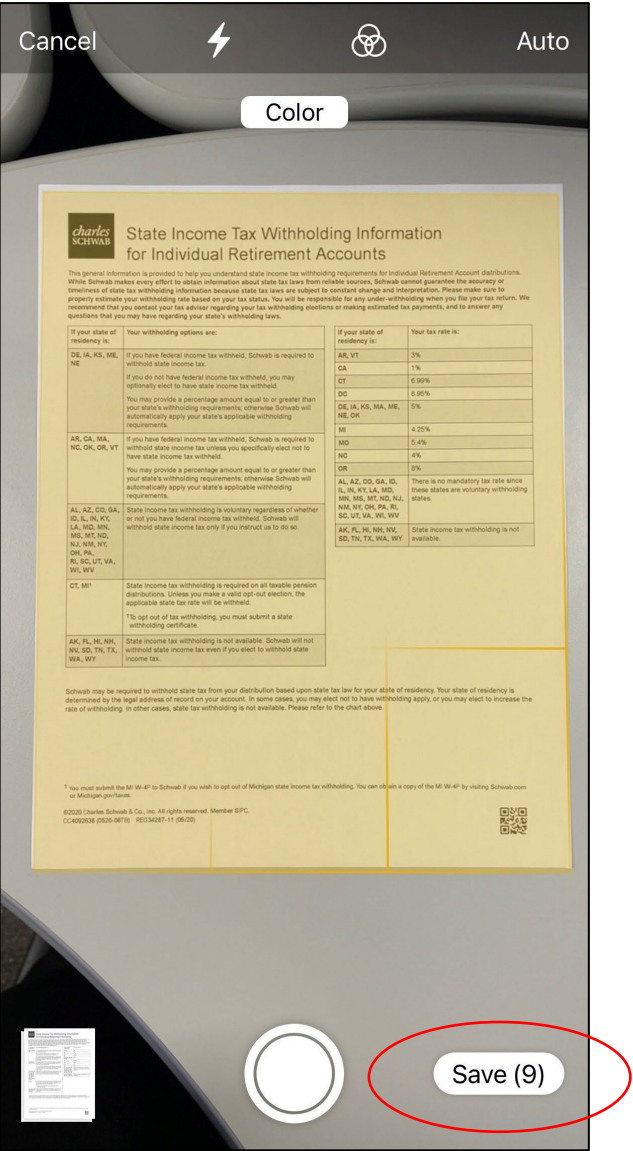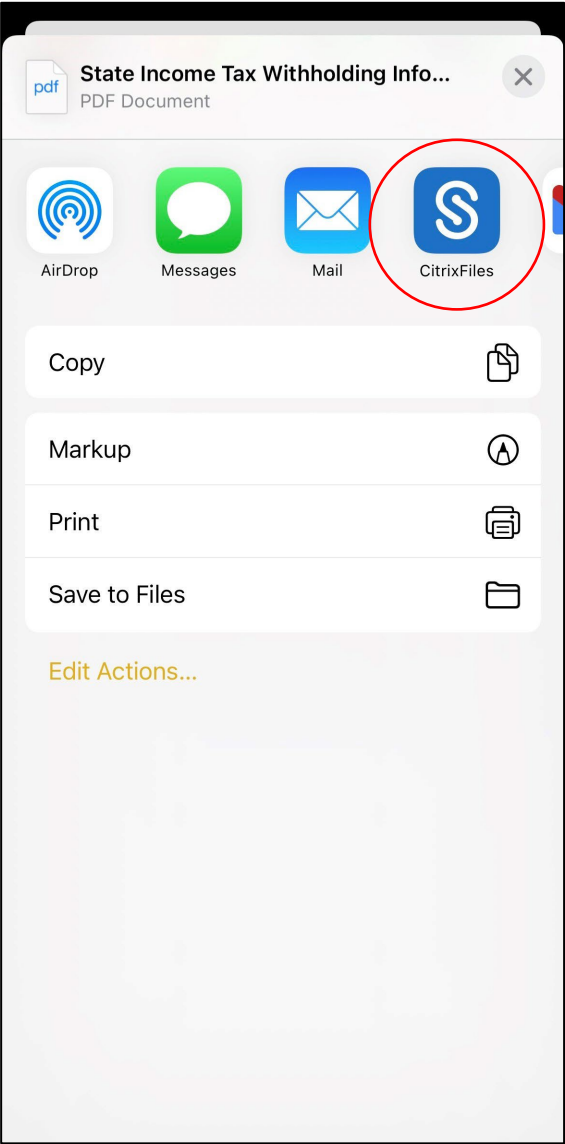
9. Your scanned pages will combine into one document
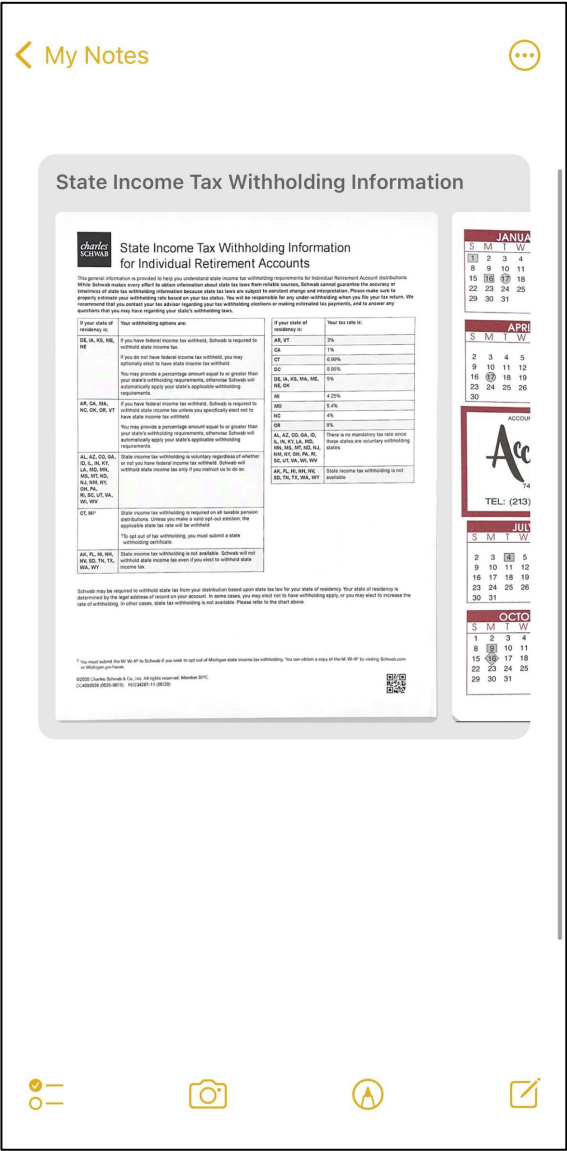
10. Touch and hold the saved scan to bring up a menu and select **Share**

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

12. You will automatically be taken to the Citrix ShareFile app

13. Tap the paper icon at the top left of your screen and select **Exit**
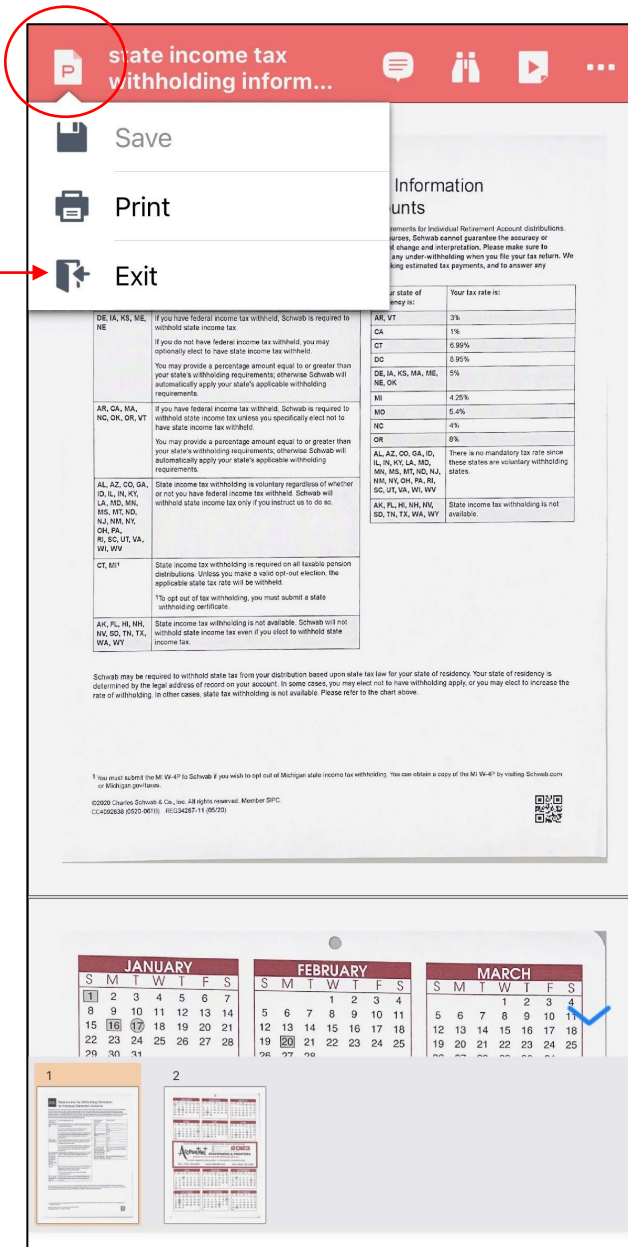
Upload   Cancel

Name: State income tax withholding inform...

← 14. Enter a name for your document

Details:

Destination: Tax   (Edit)

Upload
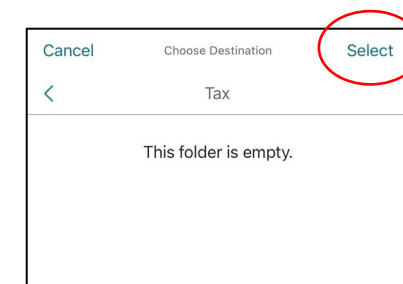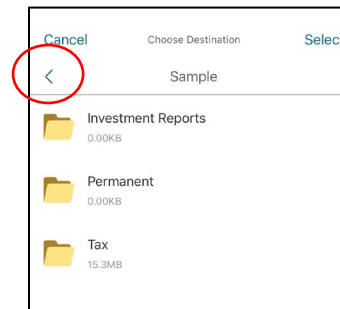
15. Choose the folder where you'd like to upload your document (if the correct folder is already selected, move on to the next step)

    a. Select **Edit**

    b. Select the back arrow on the top left of your screen to navigate out of the current folder and view other folders

    c. Select the folder you'd like to upload to and tap **Select** on the top right of your screen

Cancel	Choose Destination	Select
‹	Sample	

📁 Investment Reports
   0.00KB

📁 Permanent
   0.00KB

📁 Tax
   15.3MB

Cancel	Choose Destination	Select
‹	Tax	

This folder is empty.

16. Select **Upload** to finish