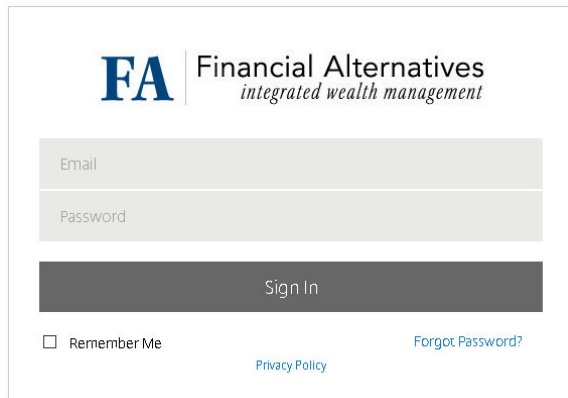


Using Your Online Vault

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

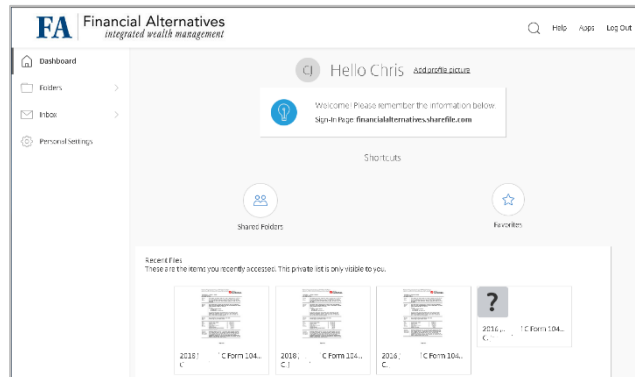
How to log in

1. Enter this URL in any web browser:
<https://financialalternatives.sharefile.com>.
Also consider using a direct link we provide by email as that may direct you to a specific subfolder to save you time.
2. Enter your username as your email address associated with the account.
3. Enter your password, and click **Sign In**. You will be taken to the Dashboard menu (or a shared folder).
4. If you cannot remember your password, click **Forgot Password**.



Account Dashboard / Shared Folders

1. The Dashboard is typically the first page that you see upon signing into ShareFile unless you use a direct link from an email.
2. Recent Files will display up to 5 files that you previously accessed from the current web browser.
3. Use the navigation menu on the left side of the page to get access folders and settings. Typically, you will navigate to **Folders > Shared Folders** to start. If you do not have a page or menu, consult with our staff about obtaining permissions.



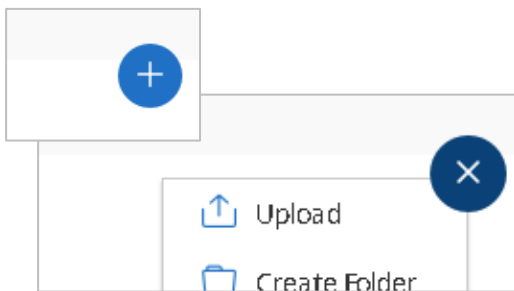
How to upload files in your account

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

Navigate to the folder where you wish to upload files.

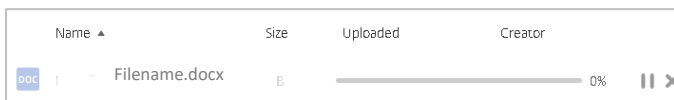
2. Since you are a client user, your folder will be in the **Shared Folders** section of the account. (If you do not have folders to access, it is most likely that you have an additional email addresses that needs to be added to your account – just ask for assistance if this happens.)

3. Hover over to the blue “+” Action Button near the top right side of the page 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.

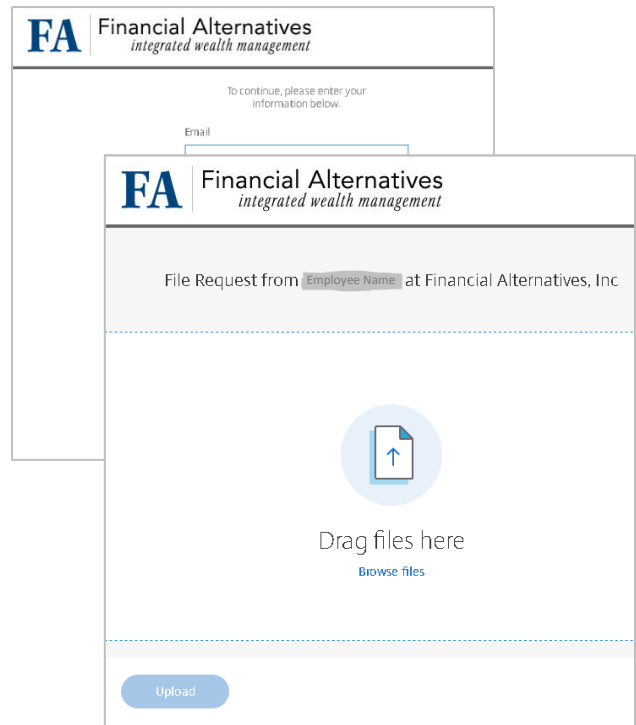
Your files will be uploaded. Upload speed can vary based on your internet connection.



Uploading with 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, Button** or as a banner with the link: **Click here to upload files**.

Note: Depending on the original requester’s message settings, you may be required to enter your email address or login before you can upload any 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.

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



Guide to your ShareFile Online Vault

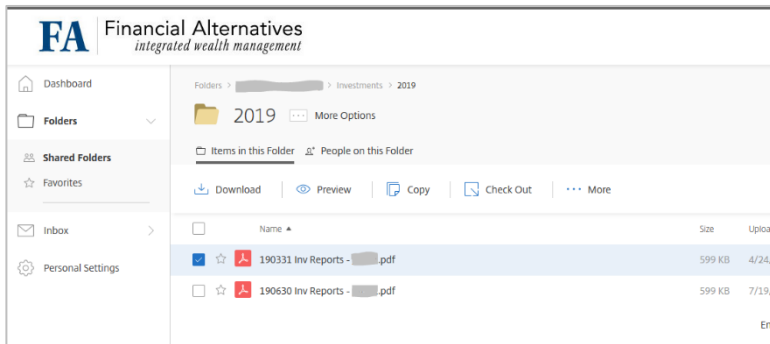
How to download files from your account

1. Log in to your ShareFile account.
2. Using the left navigation, go to the folder in your account that contains the files you wish to download. Typically, you will navigate to **Folders > Shared Folders** to begin.
3. Select the one or more files to download by checking the boxes to the left of the file name. You can then select the appropriate button to **Download** to your device or **Preview** the file(s) via the web.

Note: You may also right-click the file and select Download or Preview.

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

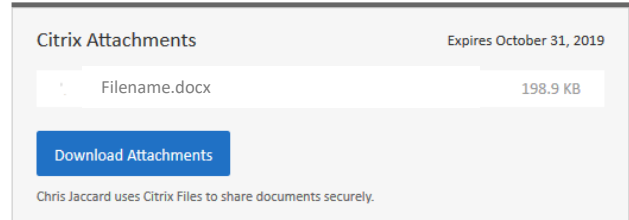
Depending on your browser settings, you may be prompted to select where files should be downloaded to.



Downloading from a 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 email address or login before you can download any files.



2. To download a single file, **right-click the file** and select the **Download** option.

3. 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.

