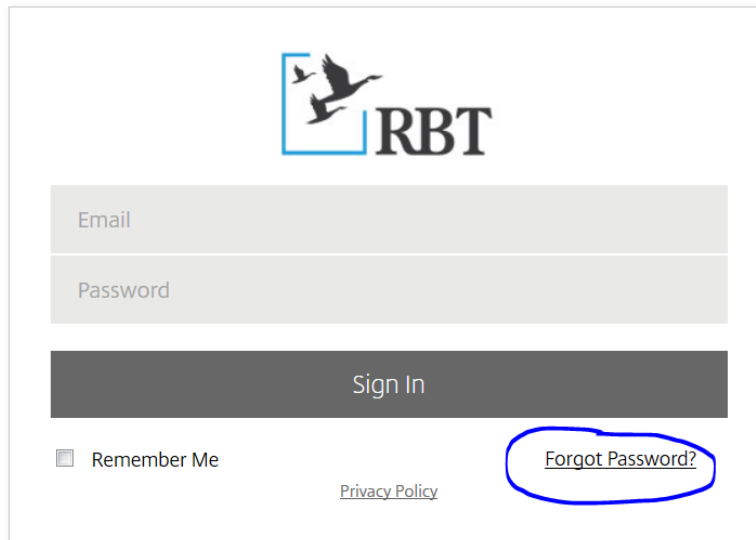


ShareFile Client Guide – LOGIN, UPLOAD, DOWNLOAD

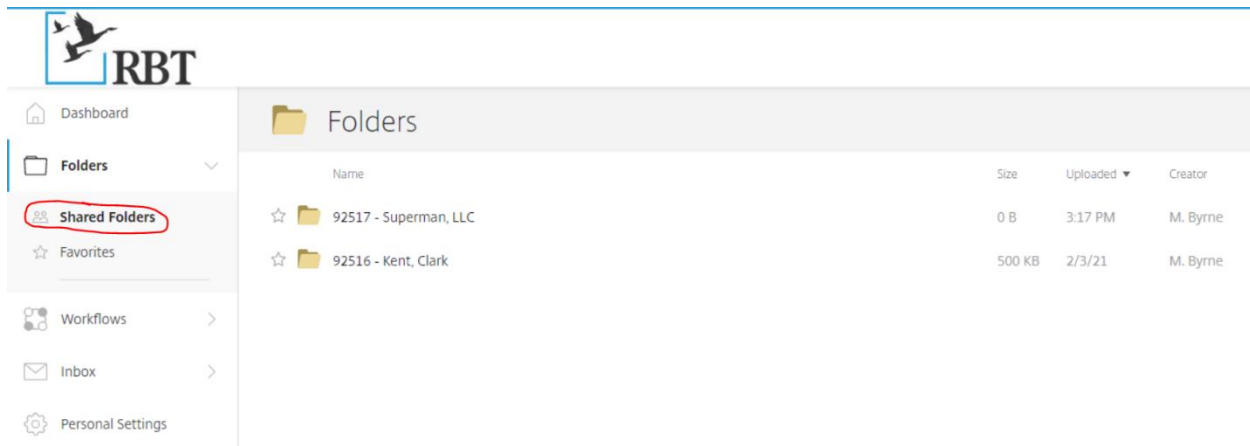
TO LOGIN TO YOUR SHAREFILE ACCOUNT:

1. Login at <https://rbt.sharefile.com>.
2. Enter your email address and password.
3. If you forgot your password, click on the Forgot password? link and ShareFile will send an email to you with instructions for resetting your password.



The login form for RBT ShareFile. It features the RBT logo at the top, which consists of a blue square with a white bird icon and the letters 'RBT' in a serif font. Below the logo are two input fields: 'Email' and 'Password'. A dark grey 'Sign In' button is positioned below these fields. At the bottom left, there is a checkbox labeled 'Remember Me'. At the bottom right, there is a link labeled 'Forgot Password?' which is circled in blue. A 'Privacy Policy' link is located between the 'Remember Me' checkbox and the 'Forgot Password?' link.

4. After logging in, your home screen will display your folders. If it does not, click on Folders, then Shared Folders in the left-hand column.



The screenshot shows the ShareFile dashboard after login. The RBT logo is in the top left. A left-hand navigation menu contains links to Dashboard, Folders, Shared Folders (highlighted with a red circle), Favorites, Workflows, Inbox, and Personal Settings. The main content area is titled 'Folders' and displays a table of folders. The table has columns for Name, Size, Uploaded, and Creator. Two folders are listed: '92517 - Superman, LLC' and '92516 - Kent, Clark'.

Name	Size	Uploaded	Creator
92517 - Superman, LLC	0 B	3:17 PM	M. Byrne
92516 - Kent, Clark	500 KB	2/3/21	M. Byrne

5. You may have just one folder with your name or business name on it; however, if you have multiple accounts, you will have multiple folders.


Folders				
	Name	Size	Uploaded	Creator
☆	92517 - Superman, LLC	0 B	3:17 PM	M. Byrne
☆	92516 - Kent, Clark	500 KB	2/3/21	M. Byrne

6. Click on one of your account folders. The default view is your subfolders or “Items in this Folder” view. Alternately, you can click on “People on this Folder” to see who will receive notifications for that folder.

Folders > Individuals, Estates and Trusts > 92516 - Kent, Clark

92516 - Kent, Clark More Options

Items in this Folder People on this Folder

 A file retention policy has been set for this folder. All files stored here will be deleted 120 day(s) after they are uploaded





<input type="checkbox"/>	Name	Size	Uploaded	Creator	
<input type="checkbox"/> ☆	Client Files	0 B	2/3/21	M. Byrne	
<input type="checkbox"/> ☆	Monthly Work	0 B	2/3/21	M. Byrne	
<input type="checkbox"/> ☆	Tax Returns	500 KB	2/3/21	M. Byrne	

Email me when a file is: ☐ Uploaded to this folder

Folders > Individuals, Estates and Trusts > 92516 - Kent, Clark

92516 - Kent, Clark More Options

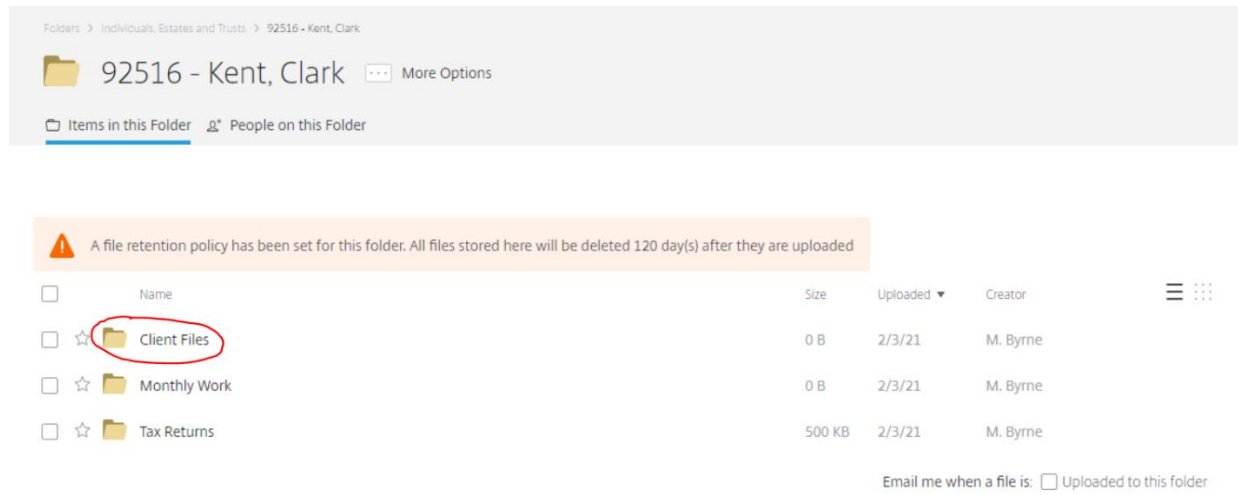
Items in this Folder People on this Folder

<input checked="" type="checkbox"/> Name	View	Download	Download Alerts	Upload	Upload Alerts	Delete	Admin
 Orlando, Ryan (RBT CPAs, LLP) (owner)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Portal Admins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 RBT CPAs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Kent, Clark	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

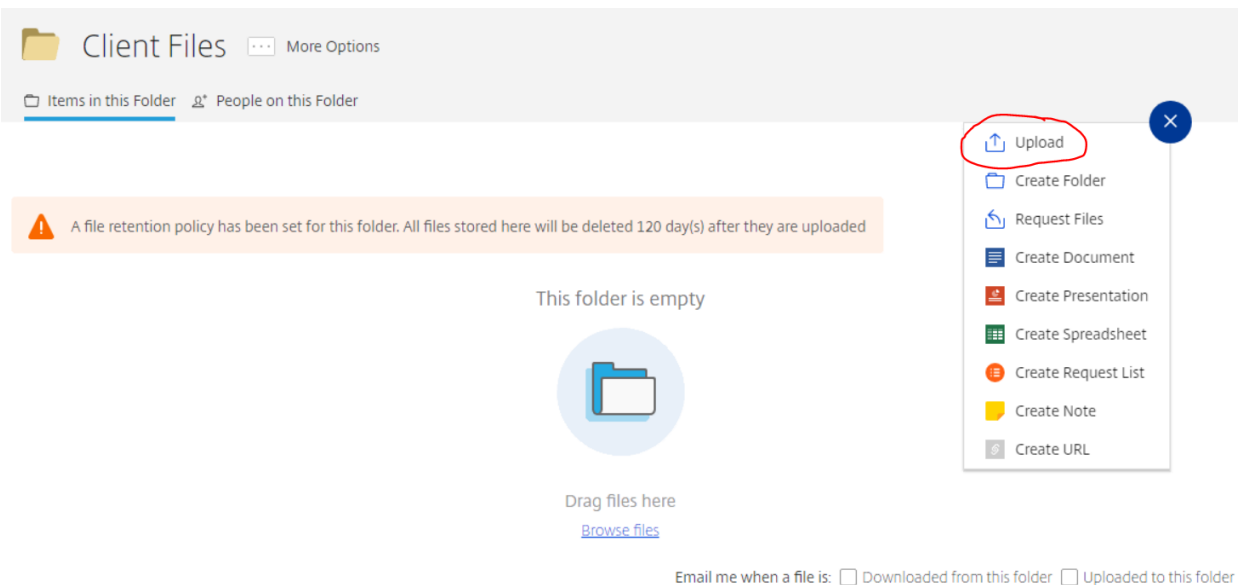
☐ Apply permissions to subfolders

TO UPLOAD FILES:

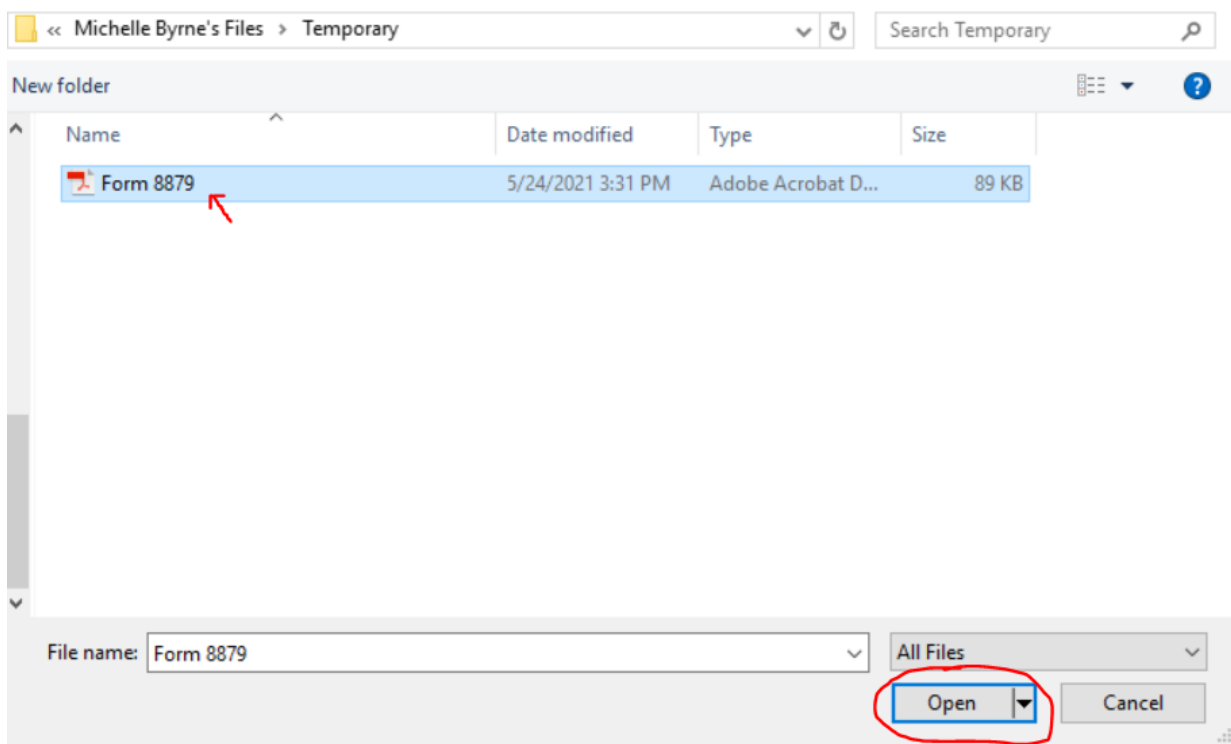
1. Click on the subfolder you would like to upload into (you must choose a subfolder before the upload option will appear). If you are not sure which folder to use, choose Client Files.



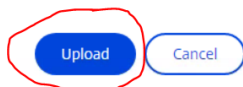
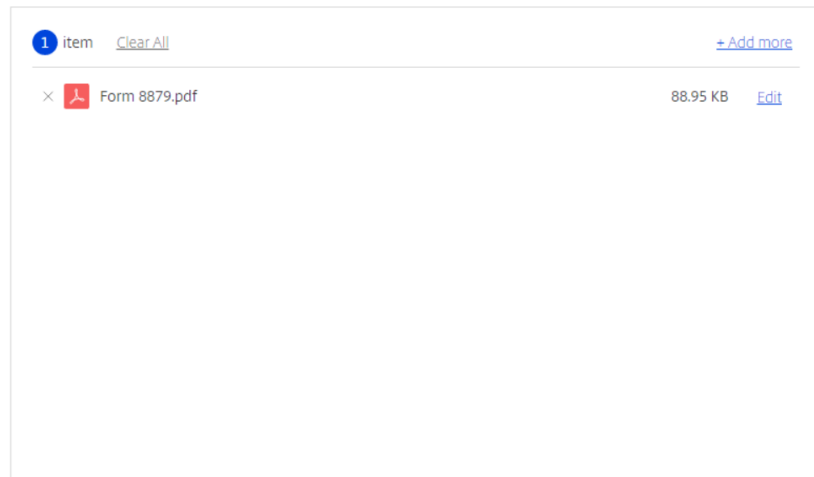
2. Hover your mouse over the blue circle and choose Upload.



3. Select the file you would like to upload from your computer and click Open. Then click Upload on the second screen that pops open.








Upload to "Client Files"









4. The file shows up in your folder and RBT receives an email notification that your file has been uploaded.

Folders > Individuals, Estates and Trusts > 92516 - Kent, Clark > Client Files

 Client Files  More Options

 Items in this Folder  People on this Folder 

 A file retention policy has been set for this folder. All files stored here will be deleted 120 day(s) after they are uploaded

<input type="checkbox"/>	Name	Size	Uploaded ▼	Creator	 
<input type="checkbox"/>	  Form 8879.pdf 	89 KB	3:36 PM	C. Kent	

Email me when a file is: ☒ Uploaded to this folder

TO DOWNLOAD FILES:

1. Click on a folder. (For example, click on the Client Files folder).

Folders > Individuals, Estates and Trusts > 92516 - Kent, Clark

92516 - Kent, Clark More Options

Items in this Folder People on this Folder

A file retention policy has been set for this folder. All files stored here will be deleted 120 day(s) after they are uploaded

<input type="checkbox"/>	Name	Size	Uploaded	Creator	
<input type="checkbox"/>	Client Files	0 B	2/3/21	M. Byrne	
<input type="checkbox"/>	Monthly Work	0 B	2/3/21	M. Byrne	
<input type="checkbox"/>	Tax Returns	500 KB	2/3/21	M. Byrne	

Email me when a file is: ☐ Uploaded to this folder

2. Click on the file you would like to open.

Folders > Individuals, Estates and Trusts > 92516 - Kent, Clark > Client Files

Client Files More Options

Items in this Folder People on this Folder

A file retention policy has been set for this folder. All files stored here will be deleted 120 day(s) after they are uploaded

<input type="checkbox"/>	Name	Size	Uploaded	Creator	
<input type="checkbox"/>	Form 8879.pdf	89 KB	3:36 PM	C. Kent	

Email me when a file is: ☒ Uploaded to this folder

3. You will see a preview of the file and several options. The most common options are Download, Print, or Email with Citrix.

< Folders > Individuals, Estates and Trusts > 92516 - Kent, Clark > Client Files

Form 8879.pdf

Details

Form 8879.pdf [Rename](#)

88.95 KB
Modified: 5/24/21 3:36 PM
MDS: d71364f9276c068aee87d159c7a1ee0

☒ Download ☐ Print ☐ Email With Citrix...

☐ Get A Link ☐ Delete ☐ Check Out

☐ Copy ☐ Move

Notes [Add Note](#)

Form 8879
(Rev. January 2021)
Department of the Treasury
Internal Revenue Service

IRS e-file Signature Authorization
► ERO must obtain and retain completed Form 8879.
► Go to www.irs.gov/Form8879 for the latest information.

OMB No. 1545-0074

Submission Identification Number (SID) ►

Taxpayer's name _____ Social security number _____

Spouse's name _____ Spouse's social security number _____

Part I Tax Return Information — Tax Year Ending December 31, _____ (Enter year you are authorizing.)

Enter whole dollars only on lines 1 through 5.

Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1	Adjusted gross income	1	
2	Total tax	2	
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099	3	
4	Amount you want refunded to you	4	
5	Amount you owe	5	

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a

TO SAVE THE FILE FOR YOURSELF:

1. Choose the Download option, then navigate to the folder of your choice on your computer and click save.

The screenshot displays a web application interface for a PDF document titled "Form 8879.pdf". The document is an "IRS e-file Signature Authorization" form, dated January 2021. The form is divided into two main sections: "Part I" and "Part II". "Part I" includes fields for "Taxpayer's name", "Spouse's name", and "Enter whole d". "Part II" includes fields for "Under penalties my knowledge return (original c to send my retu for any delay in Agent to initiate payment of my authorization is".

On the right side of the document, there is a "Details" panel for "Form 8879.pdf". It shows the file size as "88.95 KB", the modification date as "5/24/21 3:36 PM", and the MD5 hash as "d71364f276c068aee87d159dc7a8ee0". Below the details, there are several action buttons: "Download", "Print", "Email With Citrix...", "Get A Link", "Delete", "Check Out", "Copy", and "Move". The "Download" button is circled in red.

At the bottom of the document, there is a "Save As" dialog box. The "File name" field is set to "Form 8879" and the "Save as type" is set to "Adobe Acrobat Document". The "Save" button is circled in red, with a red "2." next to it.

TO PRINT THE FILE:

1. Choose the Print option, then click on the printer symbol when the PDF opens.

< Folders > Individuals, Estates and Trusts > 92516 - Kent, Clark > Client Files
Form 8879.pdf

Details
Form 8879.pdf [Rename](#)
88.95 KB
Modified: 5/24/21 3:36 PM
MDS: d71364f1276c068aea87d159dc7a8ee0

Download Print Email With Citrix...

Get A Link Delete Check Out

Copy Move

Notes [Add Note](#)

Form 8879
(Rev. January 2021)
Department of the Treasury
Internal Revenue Service

IRS e-file Signature Authorization
OMB No. 1545-0074
► ERO must obtain and retain completed Form 8879.
► Go to www.irs.gov/Form8879 for the latest information.

Submission Identification Number (SID) ►

Taxpayer's name _____ Social security number _____
Spouse's name _____ Spouse's social security number _____

Part I Tax Return Information — Tax Year Ending December 31, (Enter year you are authorizing.)
Enter whole dollars only on lines 1 through 5.
Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1	Adjusted gross income	1
2	Total tax	2
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099	3
4	Amount you want refunded to you	4
5	Amount you owe	5

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)
Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2

1 / 2 | — 100% + |

Form 8879
(Rev. January 2021)
Department of the Treasury
Internal Revenue Service

IRS e-file Signature Authorization
OMB No. 1545-0074
► ERO must obtain and retain completed Form 8879.
► Go to www.irs.gov/Form8879 for the latest information.

Submission Identification Number (SID) ►

Taxpayer's name _____ Social security number _____
Spouse's name _____ Spouse's social security number _____

Part I Tax Return Information — Tax Year Ending December 31, (Enter year you are authorizing.)
Enter whole dollars only on lines 1 through 5.

TO SEND THE FILE(S) TO SOMEONE ELSE:

1. Choose the Email with Citrix option.

Form 8879.pdf

Details

Form 8879.pdf [Rename](#)

88.95 KB

Modified: 5/24/21 3:36 PM

MD5: c71364f7276c068ae87d159c7a8e0

Download Print **Email With Citrix...** Get A Link Delete Check Out Copy Move

Notes [Add Note](#)

Form 8879
(Rev. January 2021)
Department of the Treasury
Internal Revenue Service

IRS e-file Signature Authorization
OMB No. 1545-0074

► ERO must obtain and retain completed Form 8879.
► Go to www.irs.gov/Form8879 for the latest information.

Submission Identification Number (SID) ►

Taxpayer's name _____ Social security number _____

Spouse's name _____ Spouse's social security number _____

Part I Tax Return Information — Tax Year Ending December 31, _____ (Enter year you are authorizing.)

Enter whole dollars only on lines 1 through 5.

Note: Form 1040-S filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1	Adjusted gross income	1
2	Total tax	2
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099	3
4	Amount you want refunded to you	4
5	Amount you owe	5

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2

2. You will be given a screen to enter an email address, subject, and message to the recipient. Press Send at the bottom of the screen.

Email with Citrix ShareFile

Recipients: * Required

Select...

Subject:

Message: (optional)

Hi Michelle,

A copy of Form 8879 is securely attached to this email message.

Have a great day,
Clark

Character limit: 3882

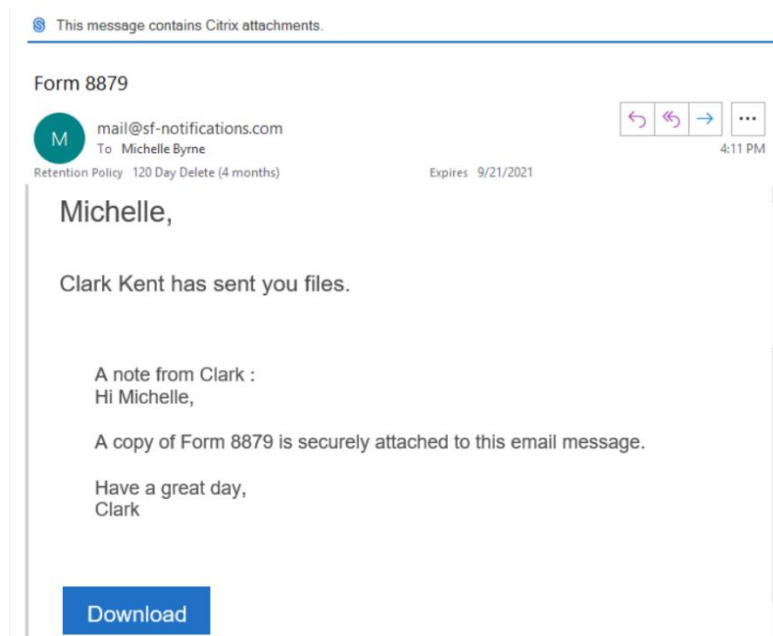
[Edit Message Options](#)

Send Cancel

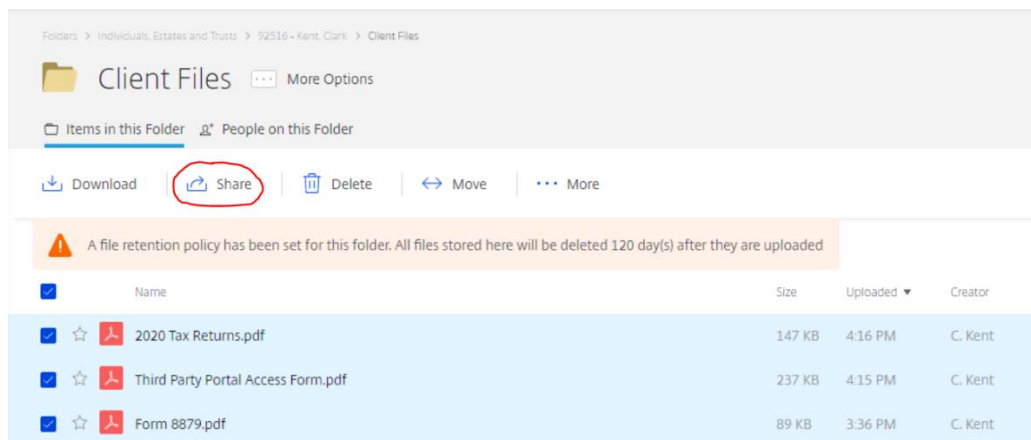
1 item [Clear All](#)

Form 8879.pdf

3. Below is a preview of what the email will look like when your recipient receives it.



4. To quickly send multiple items by email, click on the check boxes next to the files you want to send, then choose Share.



5. Choose Email with Citrix and then follow the instructions from step 2 above.

