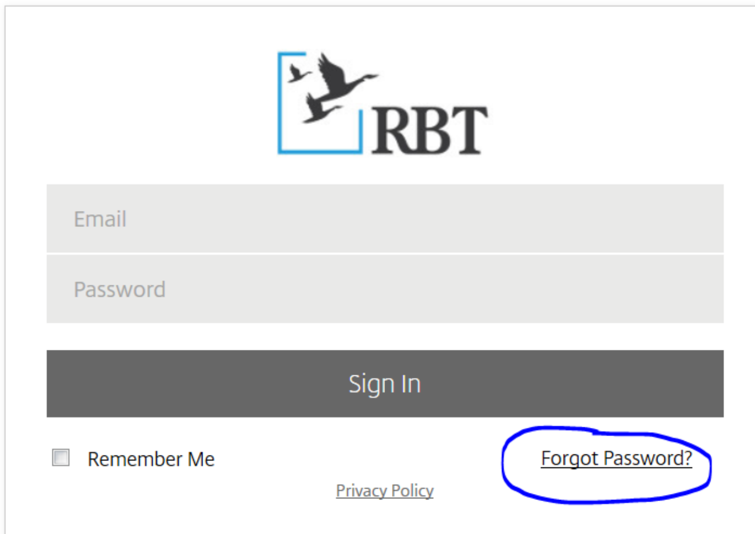
ShareFile Client Guide – LOGIN, UPLOAD, DOWNLOAD

TO LOGIN TO YOUR SHAREFILE ACCOUNT:

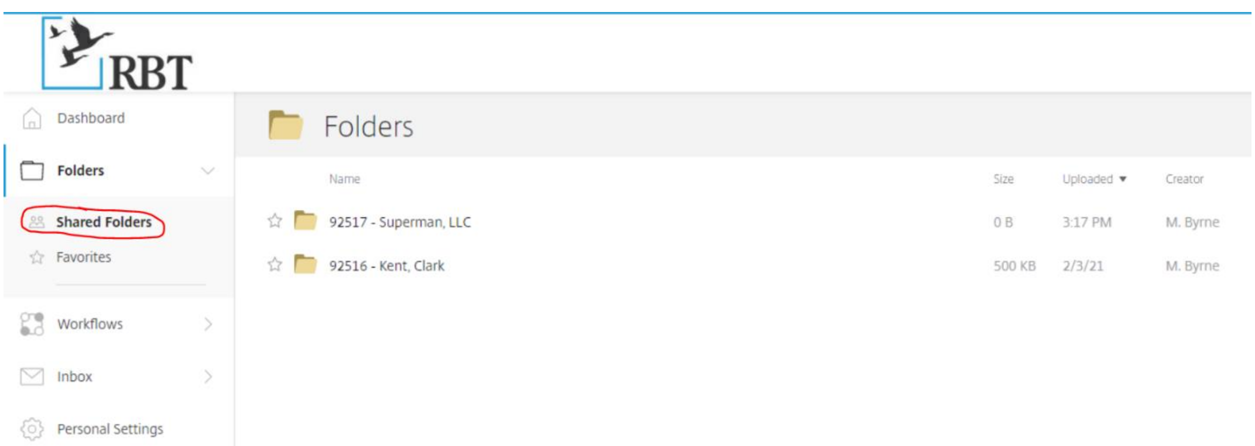
1. Login at https://rbt.sharefile.com.

2. Enter your email address and password.

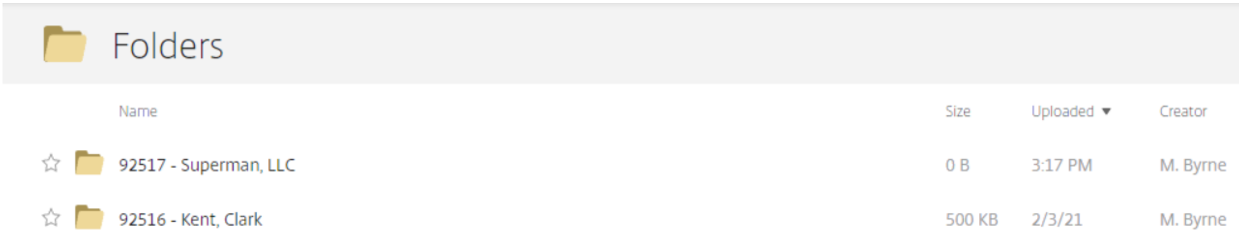
3. If you forgot your password, click on the Forgot password? link and ShareFile will send an email to you with instructions for resetting your password.



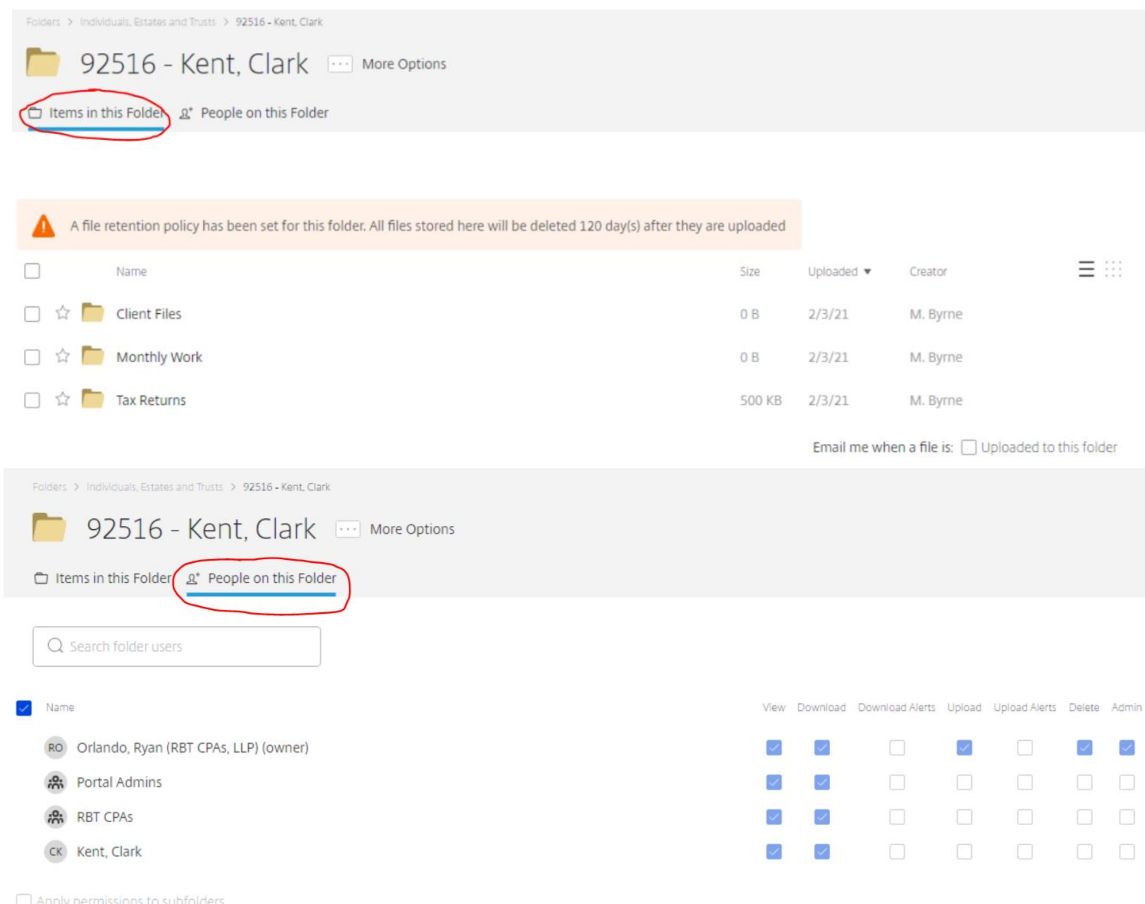
4. After logging in, your home screen will display your folders. If it does not, click on Folders, then Shared Folders in the left-hand column.



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.

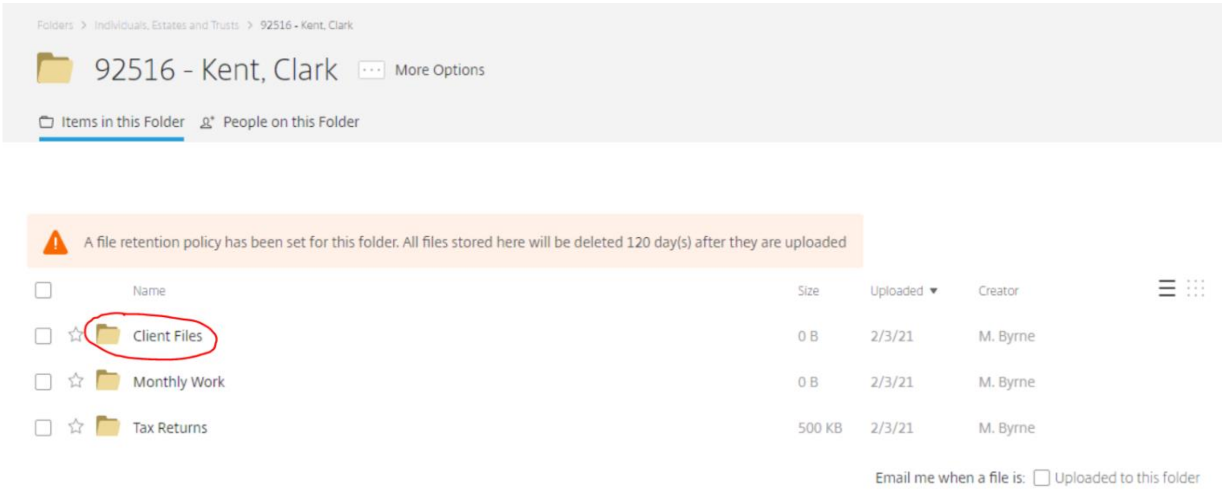


6. Click on one of your account folders. The default view is your subfolders or “Items in this Folder” view. Alternately, you can click on “People on this Folder” to see who will receive notifications for that folder.

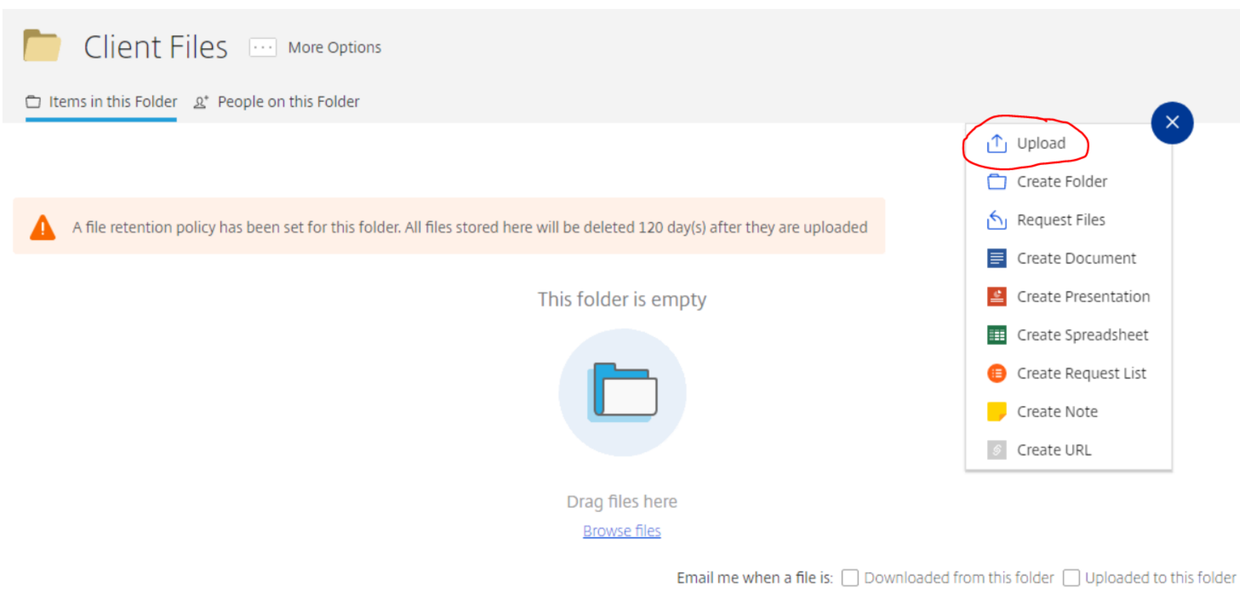


<u>**TO UPLOAD FILES:**</u>

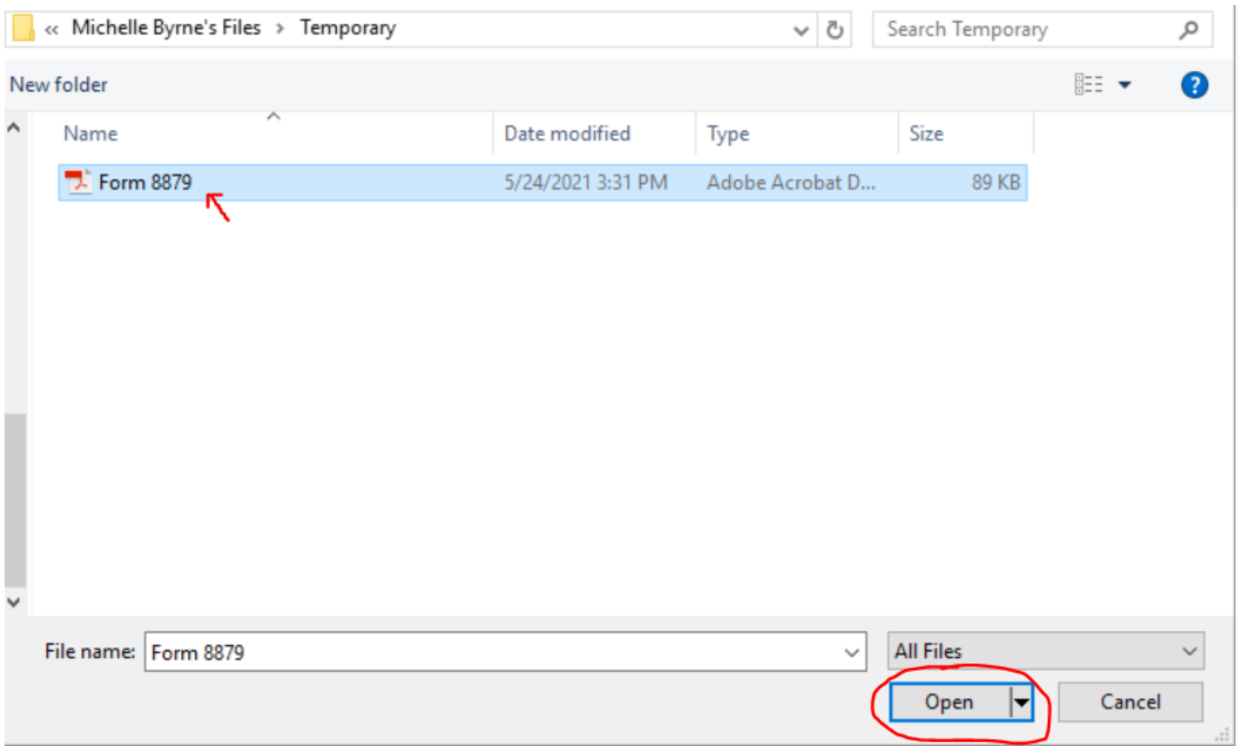
1. Click on the subfolder you would like to upload into (you must choose a subfolder before the upload option will appear). If you are not sure which folder to use, choose Client Files.

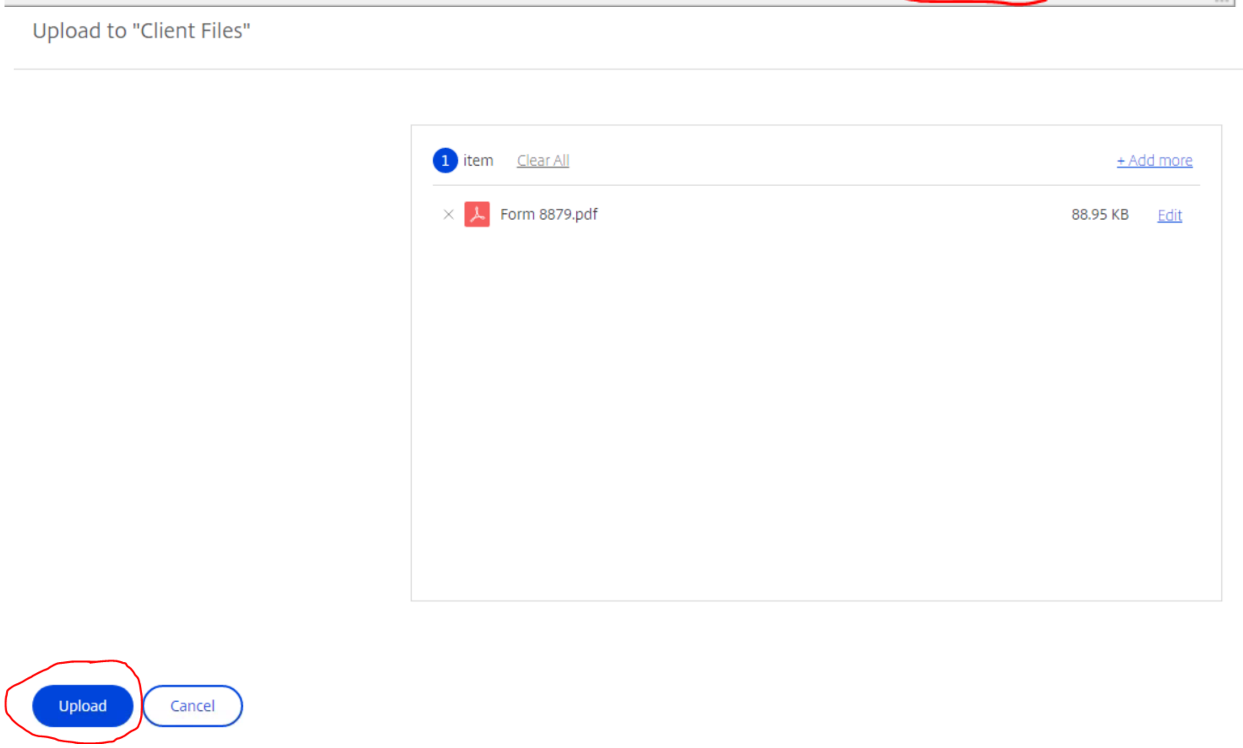


2. Hover your mouse over the blue circle and choose Upload.

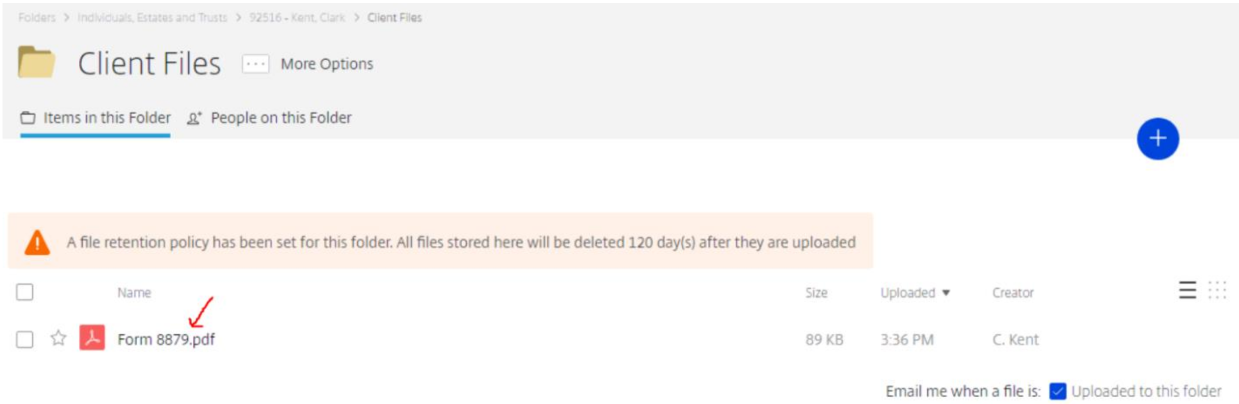


3. Select the file you would like to upload from your computer and click Open. Then click Upload on the second screen that pops open.



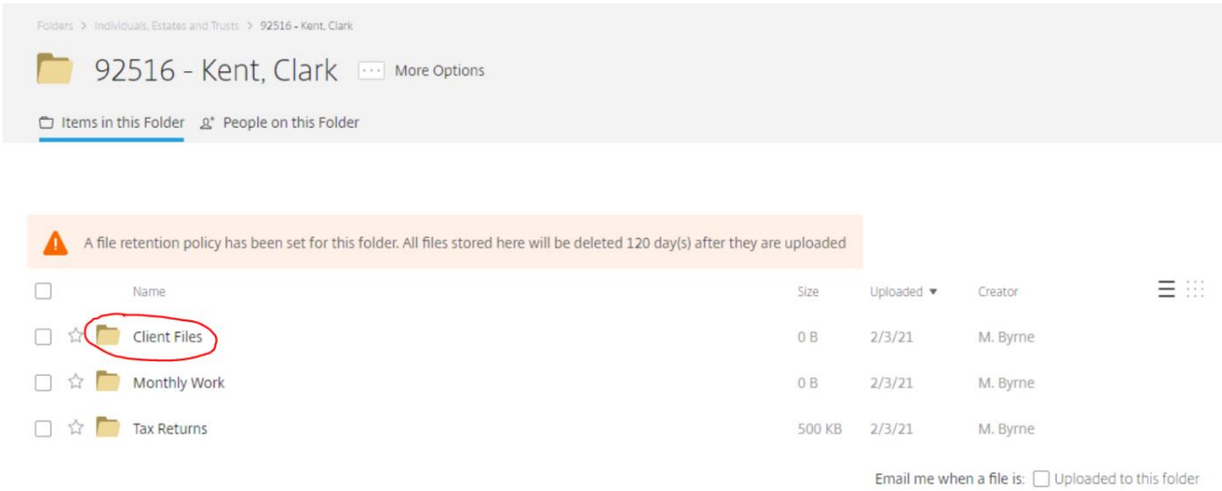


4. The file shows up in your folder and RBT receives an email notification that your file has been uploaded.

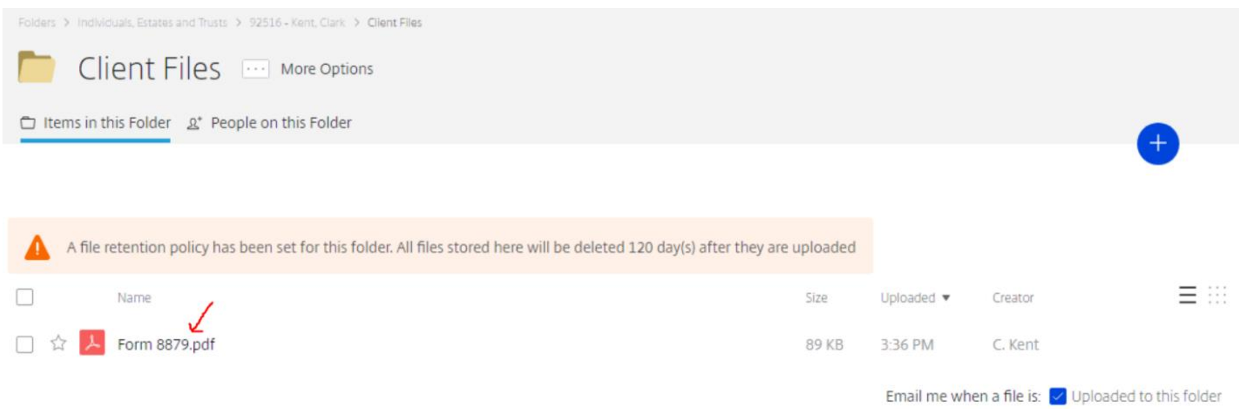


TO DOWNLOAD FILES:

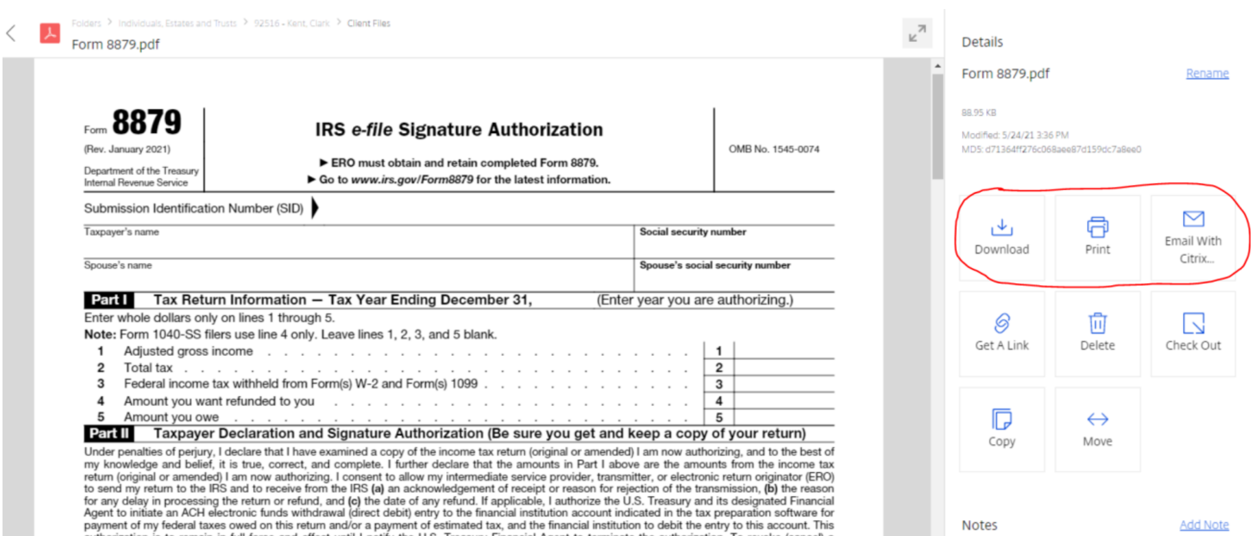
1. Click on a folder. (For example, click on the Client Files folder).



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

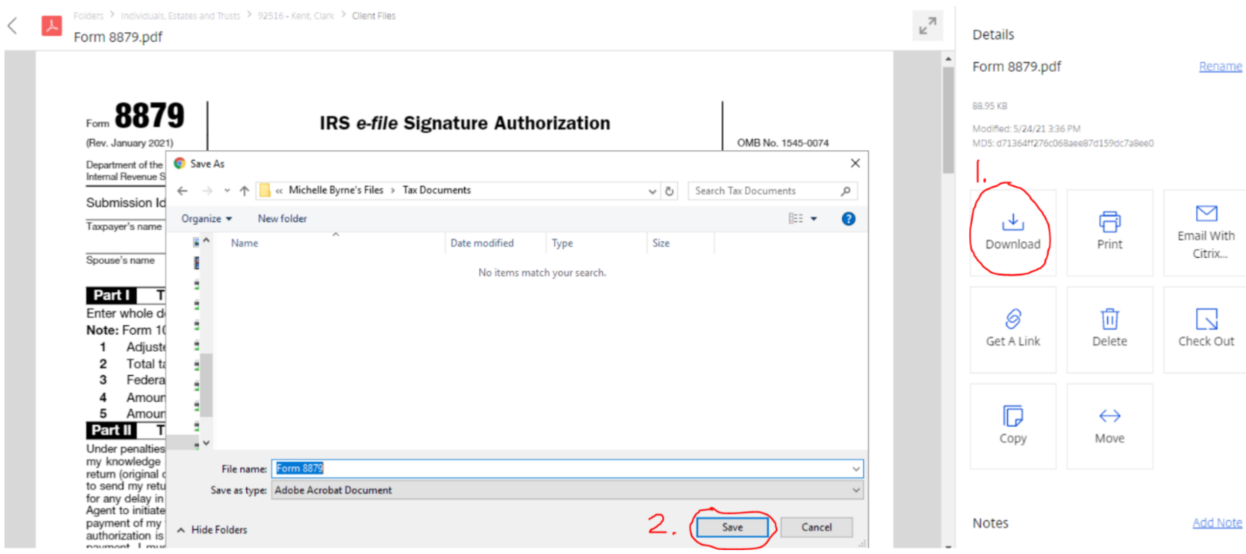


3. You will see a preview of the file and several options. The most common options are Download, Print, or Email with Citrix.



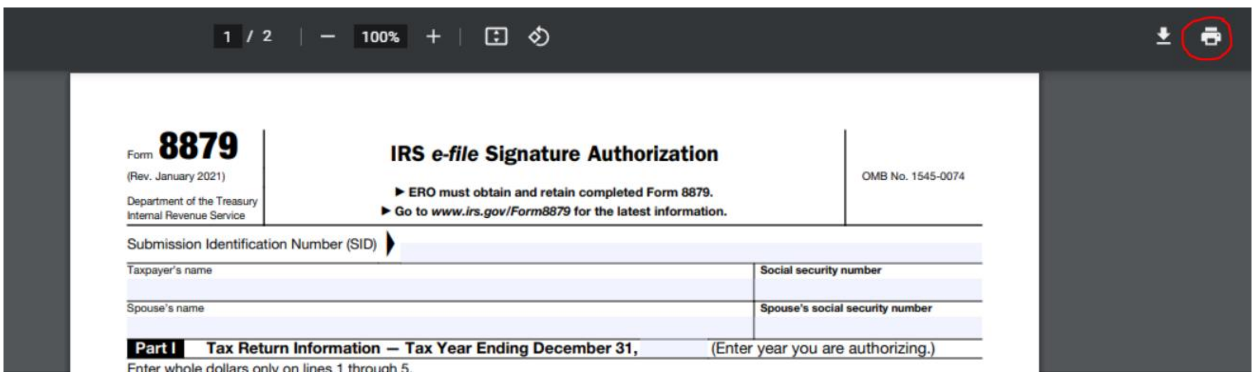
TO SAVE THE FILE FOR YOURSELF:

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



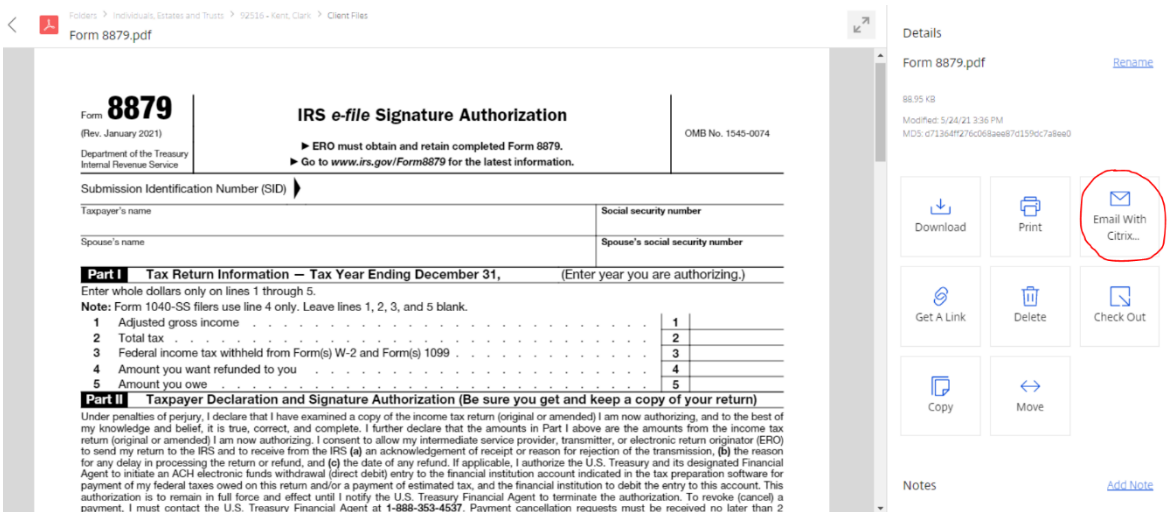
TO PRINT THE FILE:

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

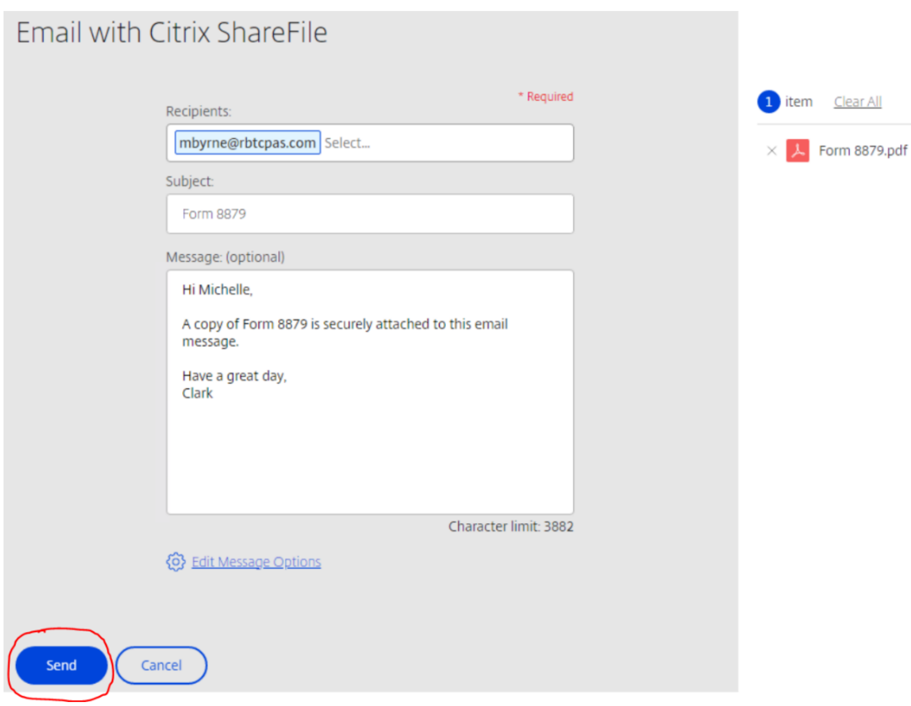


TO SEND THE FILE(S) TO SOMEONE ELSE:

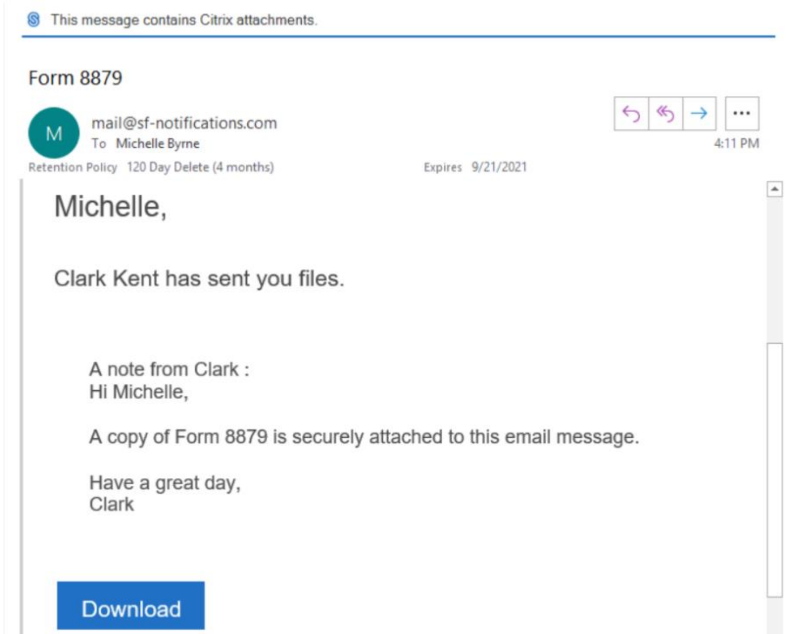
1. Choose the Email with Citrix option.



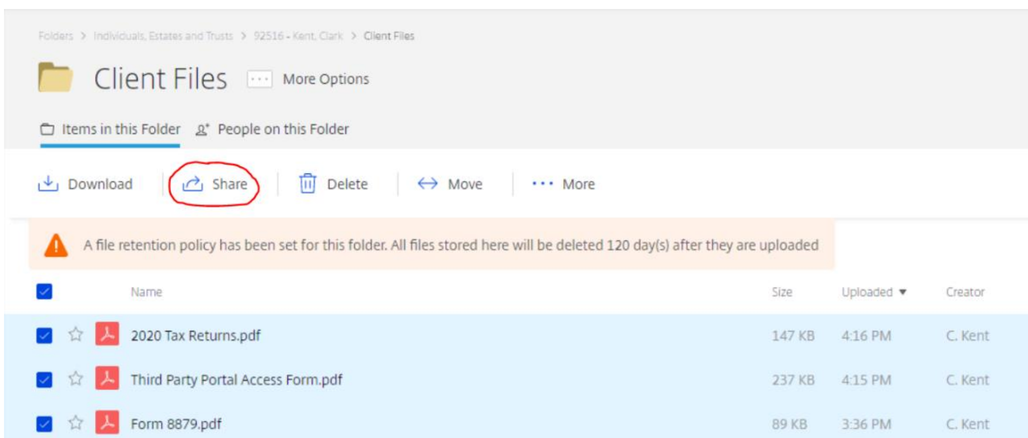
2. You will be given a screen to enter an email address, subject, and message to the recipient. Press Send at the bottom of the screen.



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.