

Introduction: The Basic Client Guide covers:

1. Activating your ShareFile account
2. Downloading files from a shared folder
3. Uploading files to a shared folder
4. Using Favorite folders
5. Creating Subfolders

1. Welcome to ShareFile!

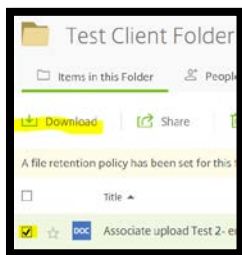
Once you have been granted access to a ShareFile account, you will receive an email with a link to activate your user account.

Once your user account is activated, you will be able to access Wipfli ShareFile going forward by navigating your browser to www.wipfli.com and clicking on Client Portal.

Note: You may have been sent a request to download or upload a file without being sent any login information. If this is the case, there is no need to enter a user name and password.

2. Downloading files

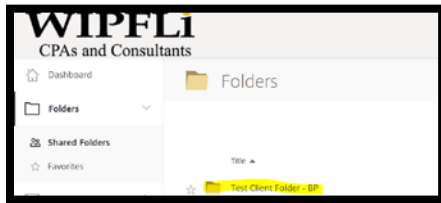
1. Using the boxes next to files and folders in the ShareFile account, select the files and folders you wish to download and click **Download**. To download an individual file, you can also click the file name.



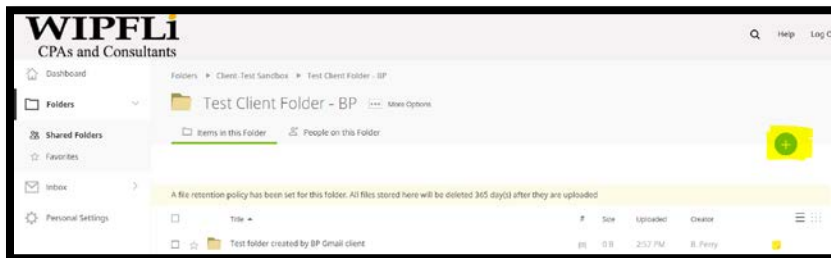
2. Depending on your web browser, you may see the file name displayed on the bottom of your screen, or a pop-up will appear prompting you to save or open the file. Select to save or open the file.
3. If you choose to open the file rather than save, you can save the file to your computer once it is open.

3. Uploading files

1. Enter a folder by clicking its title on the Home screen.



2. Click Green + and then Click **Upload Files**.



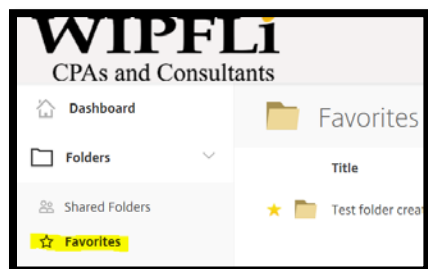
3. Click **Choose Files** and then select the files from your computer that you would like to upload.
4. Click **Upload Files**.

Note: You can upload files up to 10 GB in size using the Java upload tool. You can switch your upload tool to Java by clicking the link provided in the paragraphs above the upload box.

4. Favorite folders

In the Favorite Folders tab, click the star to the left of a folder to display it under your Favorite Folders tab. By selecting only the folders you use most to include in Favorite Folders, you can find and access these folders more easily.

You can remove a folder from the Favorite Folders tab at any time by clearing the star to the left of its name in either the Folders or Favorite Folders tab.



5. Create a subfolder

If you have upload permissions on a folder, you can also create a subfolder within that folder.

1. Click **Create Folder**.
2. Enter a folder title or name.
3. Click **Add Folder**.