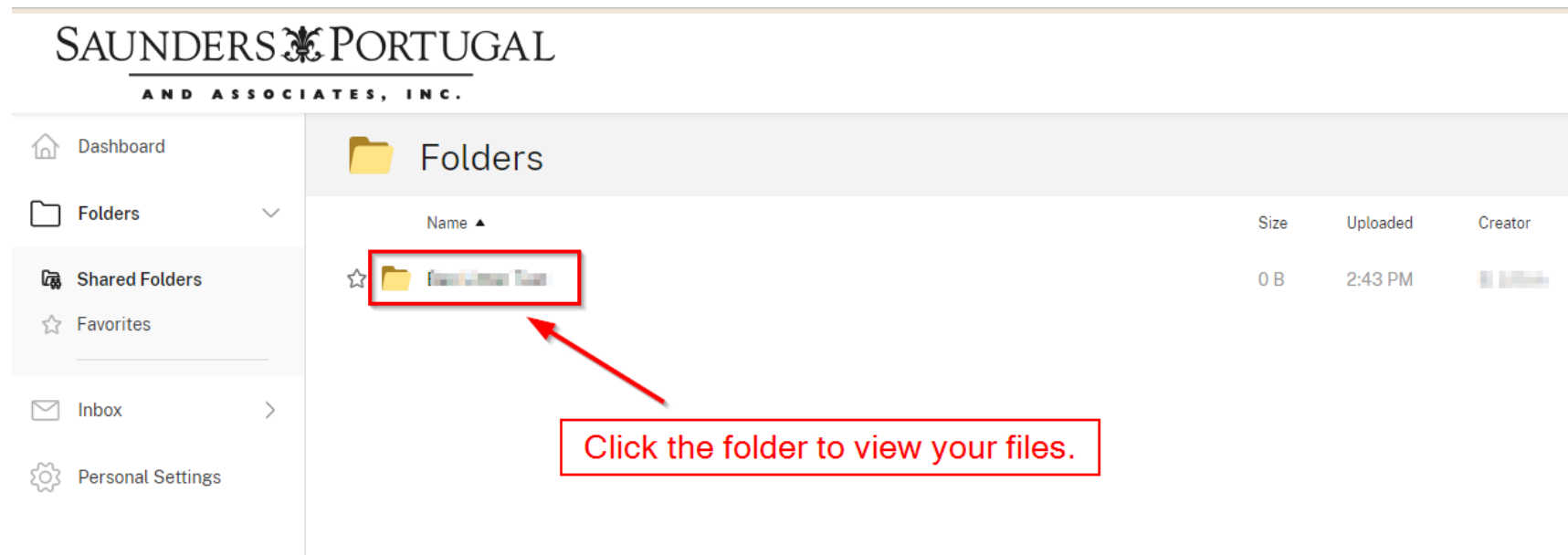



How to Use Your ShareFile Client Portal



Accessing Your Files

After logging into ShareFile, navigate to **Folders > Shared Folders** on the left side of the page. Note that you may automatically be directed here after logging in.

Once you are on the Shared Folders page, click the folder in the middle of the page to view your files.



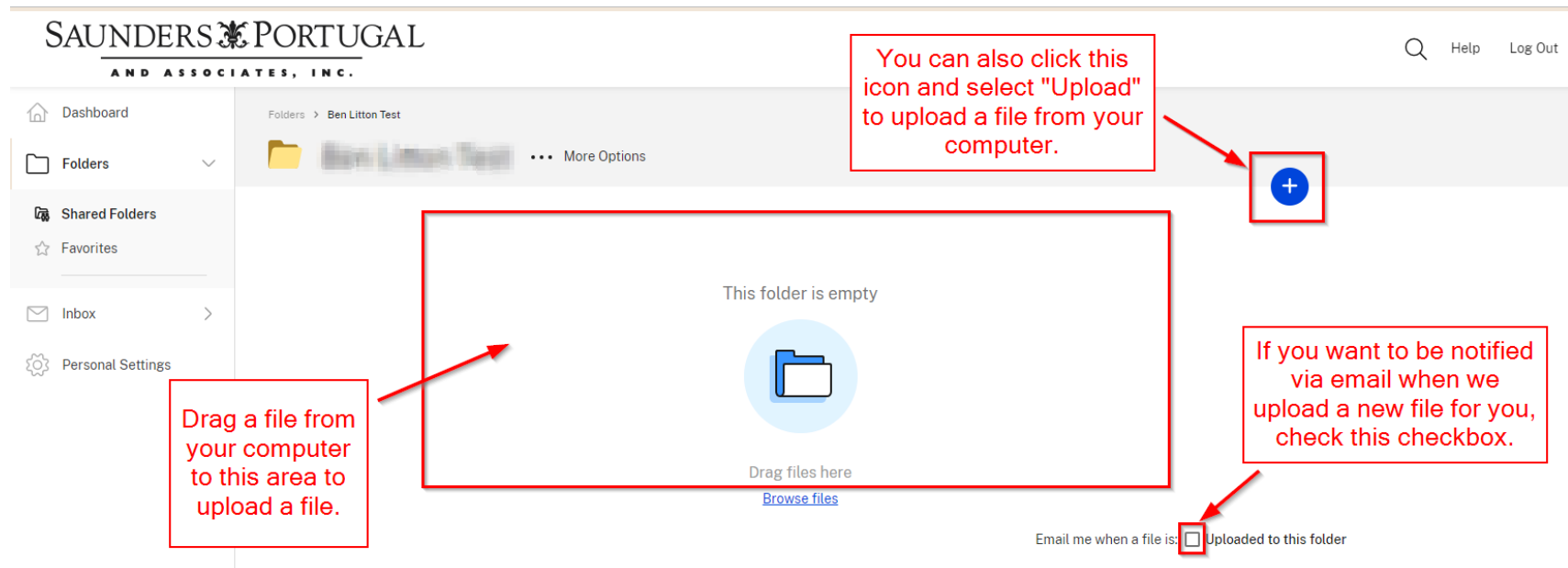
The screenshot shows the ShareFile Client Portal interface. At the top, the logo for SAUNDERS  PORTUGAL AND ASSOCIATES, INC. is displayed. On the left side, there is a navigation menu with the following items: Dashboard, Folders, Shared Folders (highlighted), Favorites, Inbox, and Personal Settings. The main content area is titled 'Folders' and contains a table with the following columns: Name, Size, Uploaded, and Creator. The table has one row with a folder icon, a star icon, and the folder name 'SAUNDERS FOLDER'. A red box highlights the folder name, and a red arrow points to it from a red box containing the text 'Click the folder to view your files.'

Name ▲	Size	Uploaded	Creator
☆  SAUNDERS FOLDER	0 B	2:43 PM	

Uploading Files

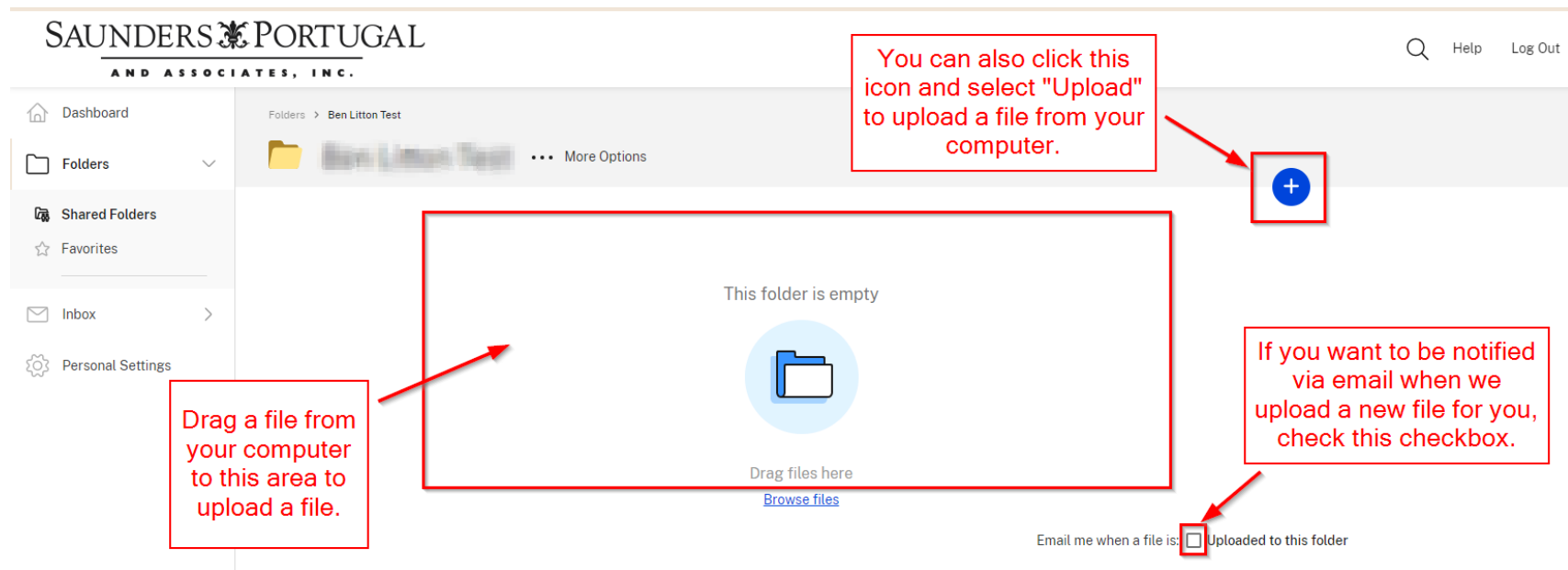
There are two ways that files can be uploaded from your computer to ShareFile (refer to screenshot below):

1. Drag a file from your computer and drop it into the middle area of the page.
2. On the right side of the page, click the **blue plus icon (+)** and then select **Upload**.



File Upload Notifications

If you want to receive email notifications when Saunders, Portugal, & Associates uploads a new file to your portal, please do the following: on the Shared Folder page, select the checkbox in the lower right corner of the page (refer to screenshot below).



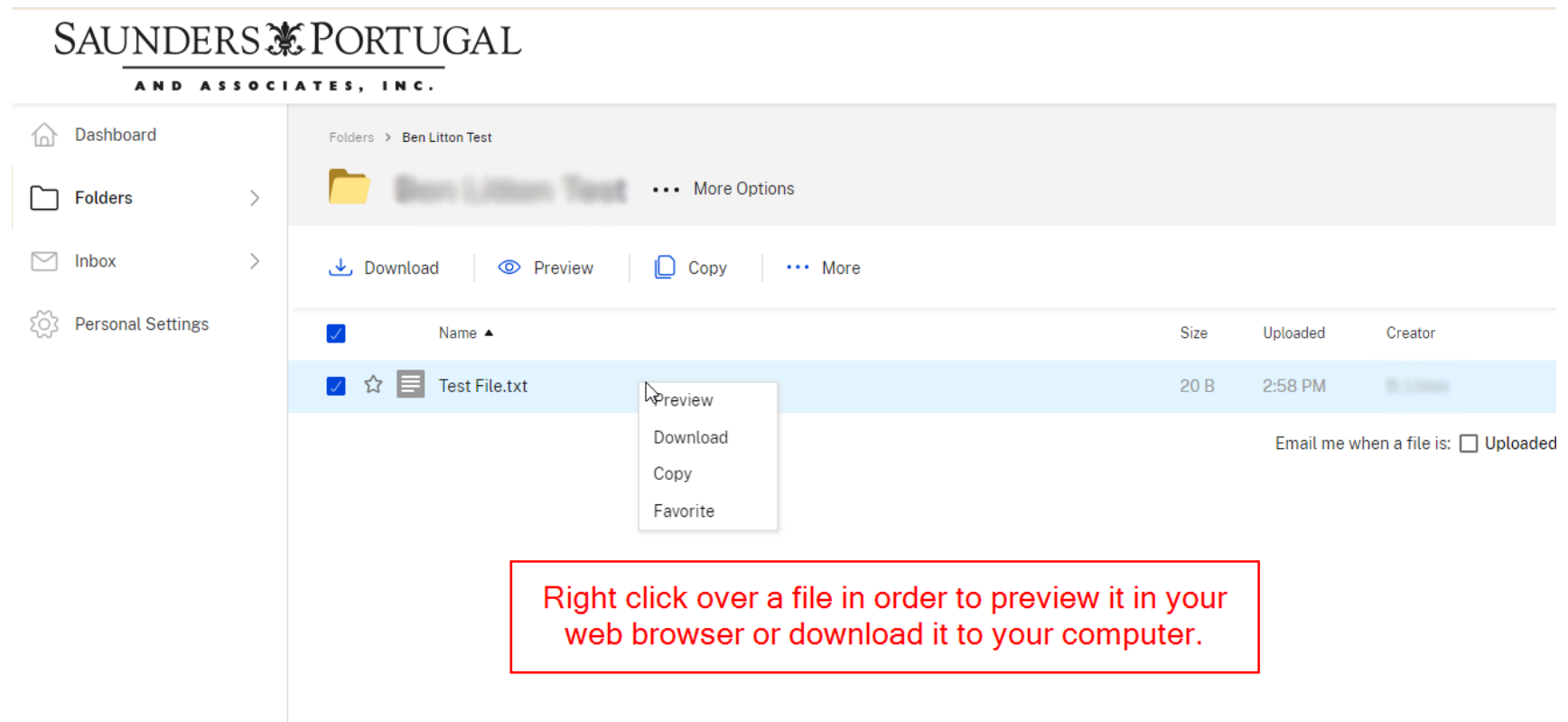
The screenshot shows the Saunders Portugal portal interface. On the left is a navigation menu with options: Dashboard, Folders, Shared Folders, Favorites, Inbox, and Personal Settings. The main content area shows a folder named "Ben Litton Test" which is currently empty. A large red box highlights the central area with the text "This folder is empty" and "Drag files here" with a "Browse files" link. A red callout box points to a blue plus icon in the top right corner of the folder view, stating: "You can also click this icon and select 'Upload' to upload a file from your computer." Another red callout box points to a checkbox in the bottom right corner, stating: "If you want to be notified via email when we upload a new file for you, check this checkbox." The checkbox is currently unchecked, and the text next to it reads "Email me when a file is: Uploaded to this folder". A third red callout box points to the central empty folder area, stating: "Drag a file from your computer to this area to upload a file."

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Preview and Download Files

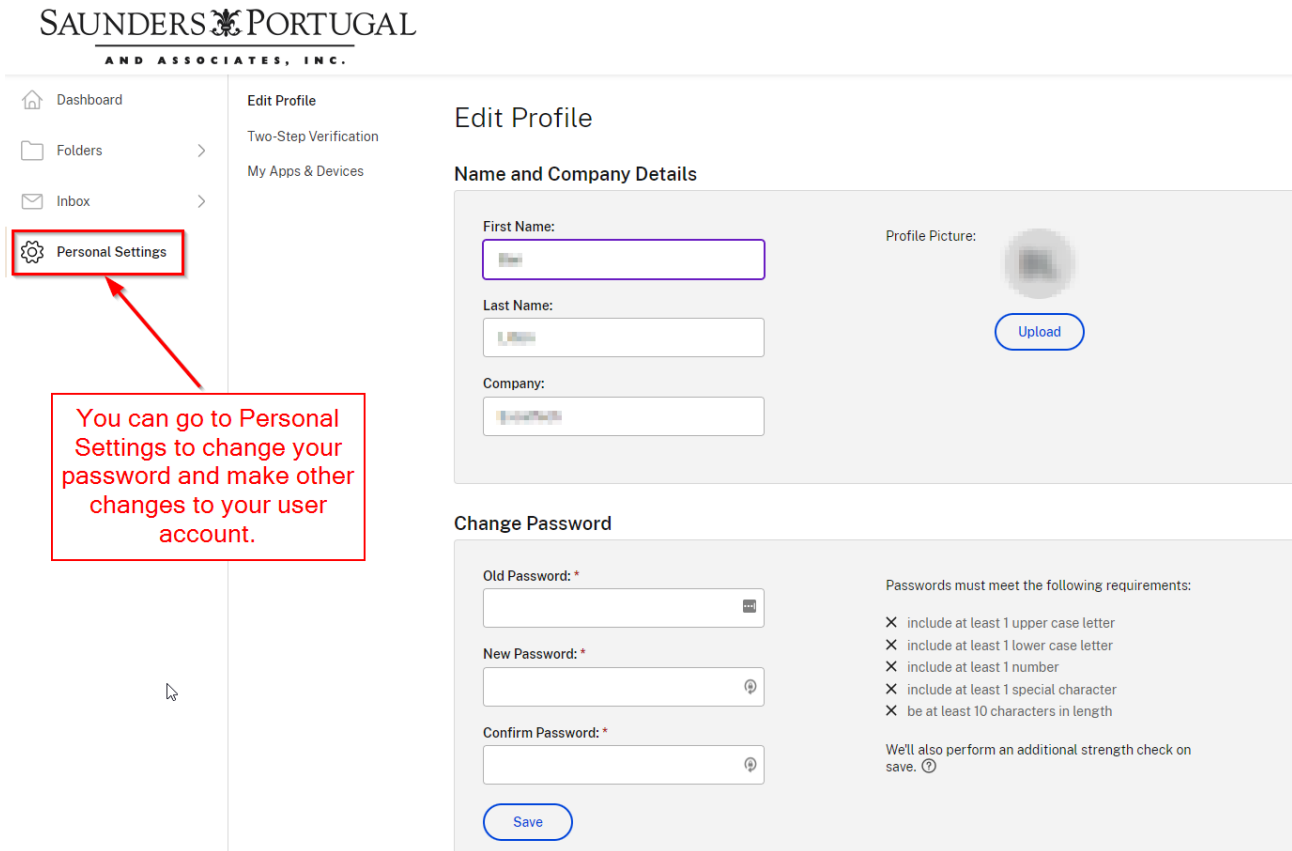
While viewing your files, right click on a particular file and you will be presented options to preview the file in your web browser (**Preview**) or download it to your computer (**Download**).




The screenshot displays the Saunders Portugal file management interface. On the left is a navigation sidebar with options: Dashboard, Folders, Inbox, and Personal Settings. The main content area shows a folder named 'Ben Litton Test' containing a file 'Test File.txt'. Above the file list are buttons for 'Download', 'Preview', 'Copy', and 'More'. The file list table has columns for Name, Size, Uploaded, and Creator. The file 'Test File.txt' is selected, and a context menu is open over it, showing 'Preview', 'Download', 'Copy', and 'Favorite' options. A checkbox for 'Email me when a file is: Uploaded' is visible to the right of the file row. A red-bordered box at the bottom of the screenshot contains the text: 'Right click over a file in order to preview it in your web browser or download it to your computer.'

Update Account Settings

On the left side of the page, navigate to **Personal Settings > Edit Profile** to change your password and edit your name and company name.



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Dashboard
Folders >
Inbox >
Personal Settings

Edit Profile
Two-Step Verification
My Apps & Devices


Edit Profile

Name and Company Details

First Name:

Last Name:

Company:

Profile Picture: 

Change Password

Old Password: *

New Password: *

Confirm Password: *

Passwords must meet the following requirements:

- × include at least 1 upper case letter
- × include at least 1 lower case letter
- × include at least 1 number
- × include at least 1 special character
- × be at least 10 characters in length

We'll also perform an additional strength check on save. [?](#)

You can go to Personal Settings to change your password and make other changes to your user account.

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