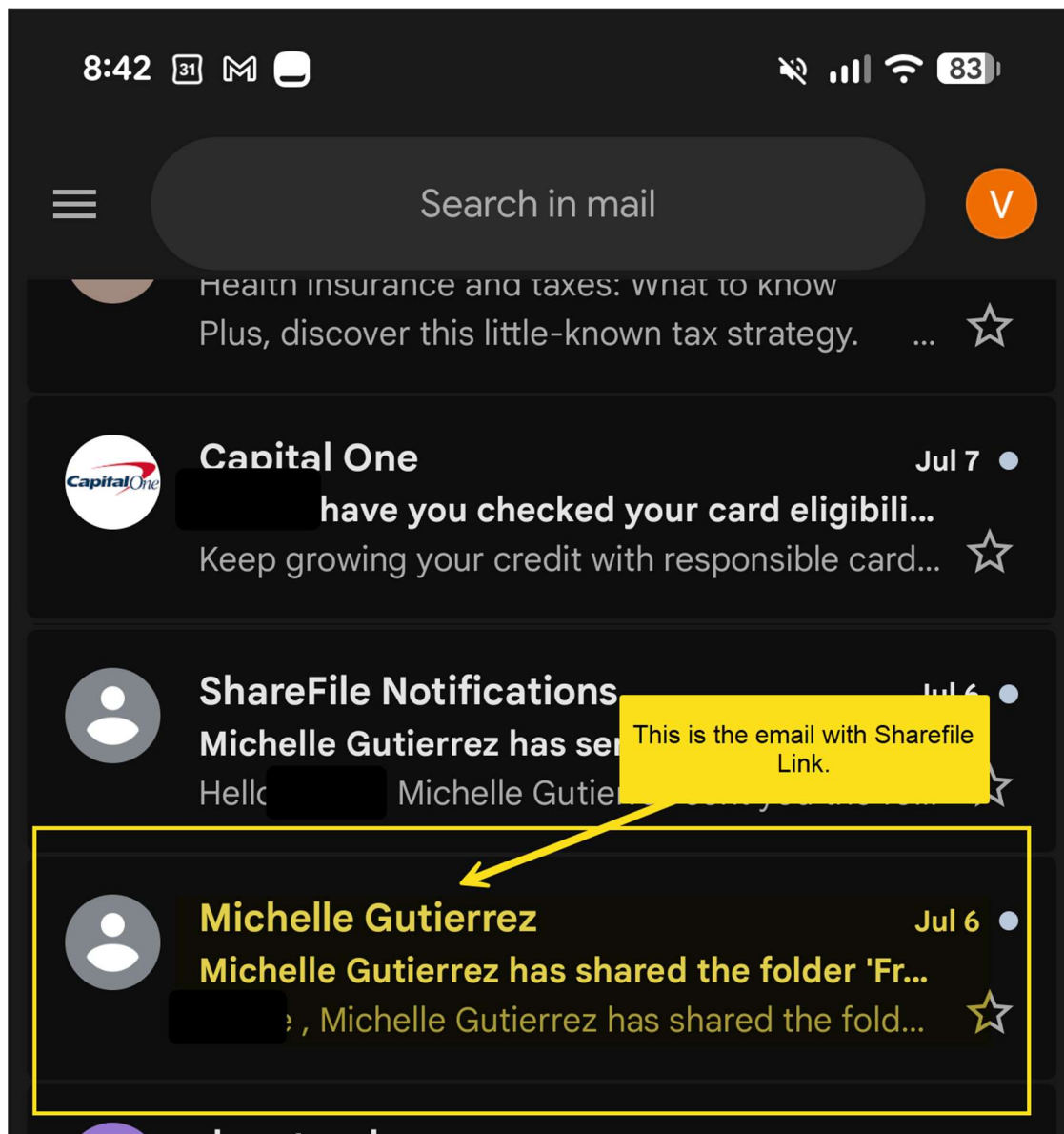
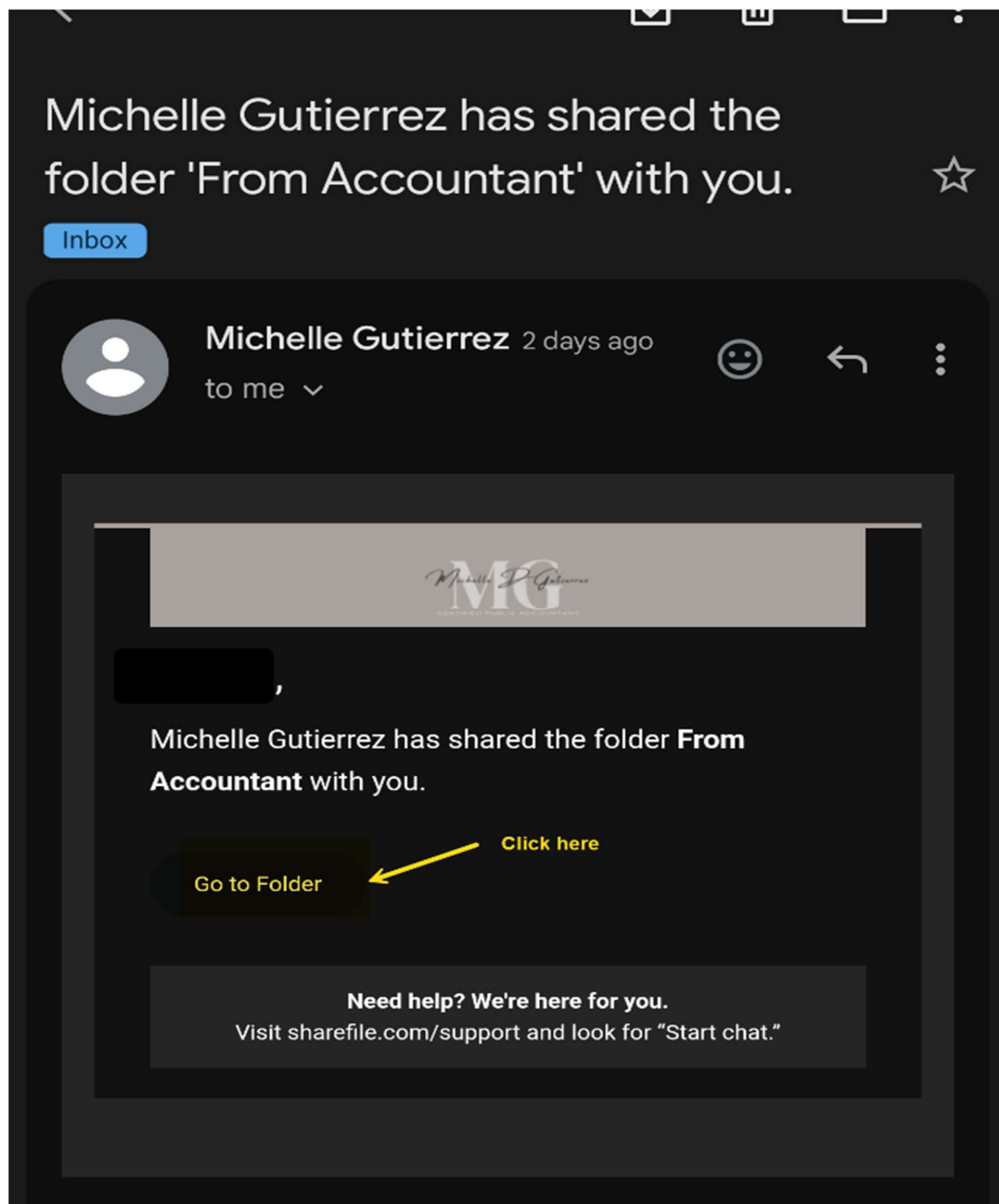


Instructions for ShareFile Using Your Mobile



Step 1: Go to your email app and find the email from Michelle Gutierrez with the invite to ShareFile.



Step 2: Once you open the email it will show you a link to take you to ShareFile; click on "Go to Folder".



Welcome!

Confirm your details to setup your account.

Email

@gmail.com

First name *

Last name *

Company

Continue

Step 3: Enter in your first and last name and company optional. Press “Continue”.

8:42 31 M 83

ShareFile - Activate User - Cr...
auth.sharefile.io



Create a ShareFile 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 characters
- ⊗ be at least 8 characters long
- ⊗ Passwords should match

We'll also perform an additional strength check on save. ⓘ

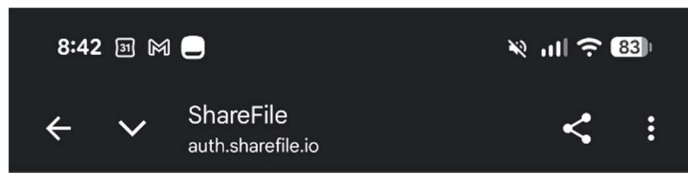
Password *

Confirm password *

Create password

Back

Step 4: You will then need to create an account. Use email and a password to sign-up and press create.



Multi-factor authentication

- 1 Type
- 2 Setup
- 3 Verify

Choose the type of multi-factor method you would like to add below.

☐ Authenticator app

☐ Phone number

[Don't setup multi-factor authentication](#)



Step 5: To verify your identity, it will ask for multi-factor authentication. It will ask if you want to use either the Authenticator app or use a phone number. Most conveniently, use your phone number.

8:43

ShareFile
auth.sharefile.io

Phone number

✓

Type

2

Setup

3

Verify

We will send a verification code to your phone whenever you sign in from an untrusted computer or device.

- We will only use this phone number for account security
- Charges from your carrier may apply

Country *

United States

Phone number *

+1 5592124814

Default delivery option *

☒ Text message (SMS)

☐ Voice call

Continue

Step 6: Enter in your phone number and make sure “Text message (SMS)” is selected at the bottom, then press continue.



Phone number

-  Type
-  Setup
-  Verify

We sent a verification code to . enter it below to verify and add it as a multi-factor authentication method.

Verification code *

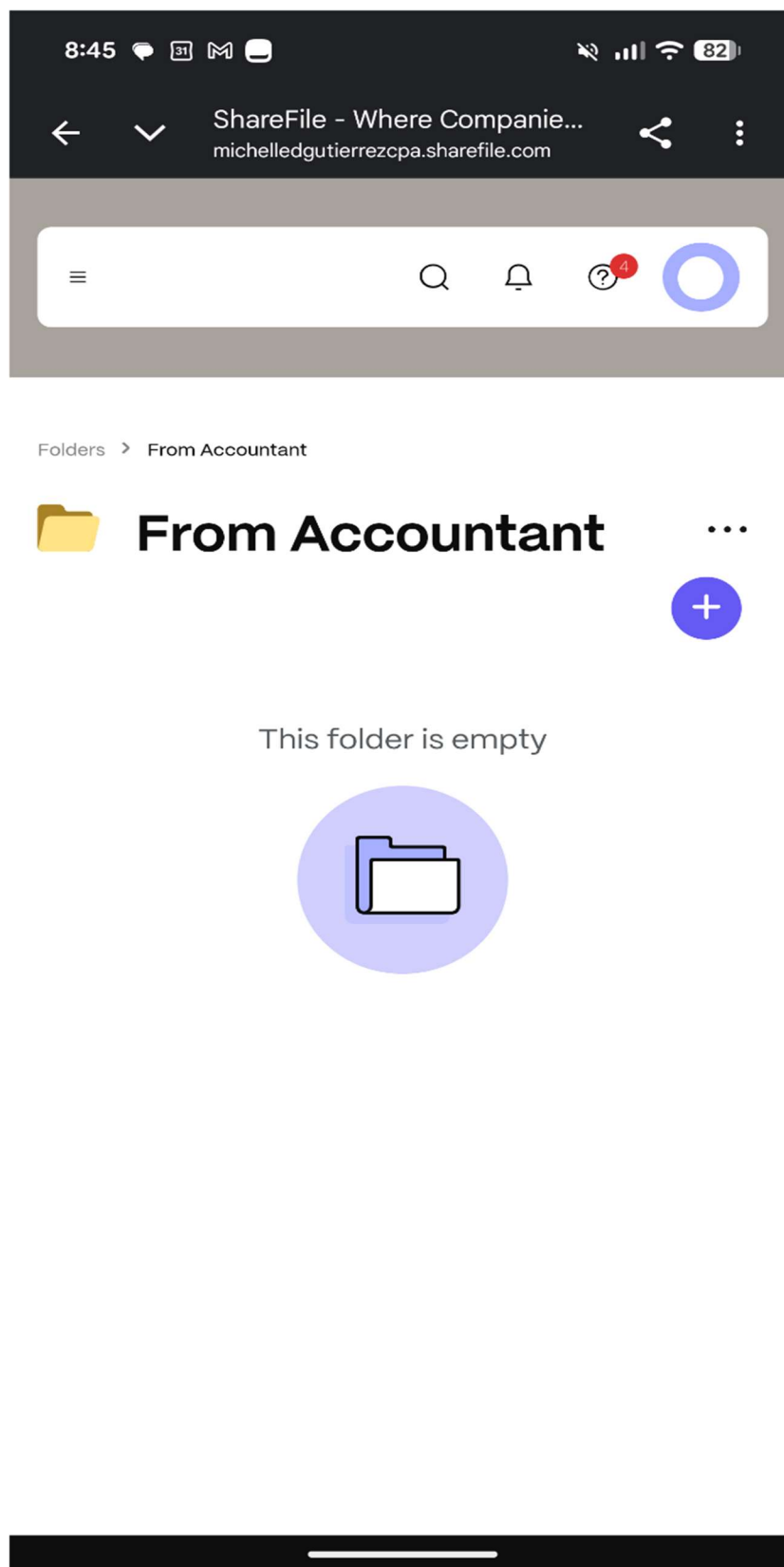
6	1	5	1	3	3
---	---	---	---	---	---

[Resend code](#)

[Continue](#)

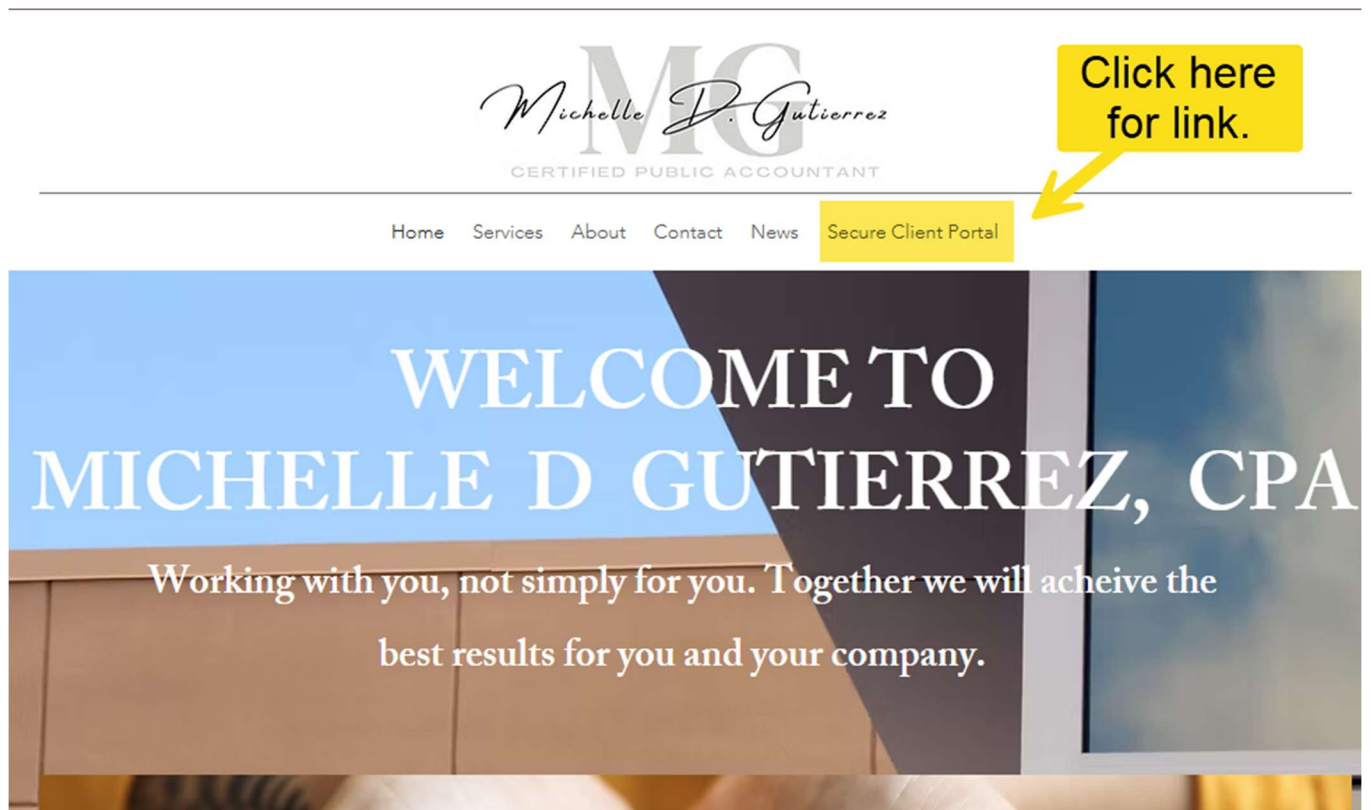
[Back](#)

Step 7: You will get a notification on your phone with a six-digit code that you will enter into website. Once entered, press “Continue”.



Step 8: Once you are verified it will take you to your folders tab with a folder named “From Accountant”. Click on that folder to see your important shared documents.

Instructions for ShareFile Using the Web



Step 1: Type in Michelle Gutierrez CPA in search bar and click on website. It will take you to home page where you will then click on “Secure Client Portal” in the menu.



[Home](#) [Services](#) [About](#) [Contact](#) [News](#) [Secure Client Portal](#)

Secure Client Portal

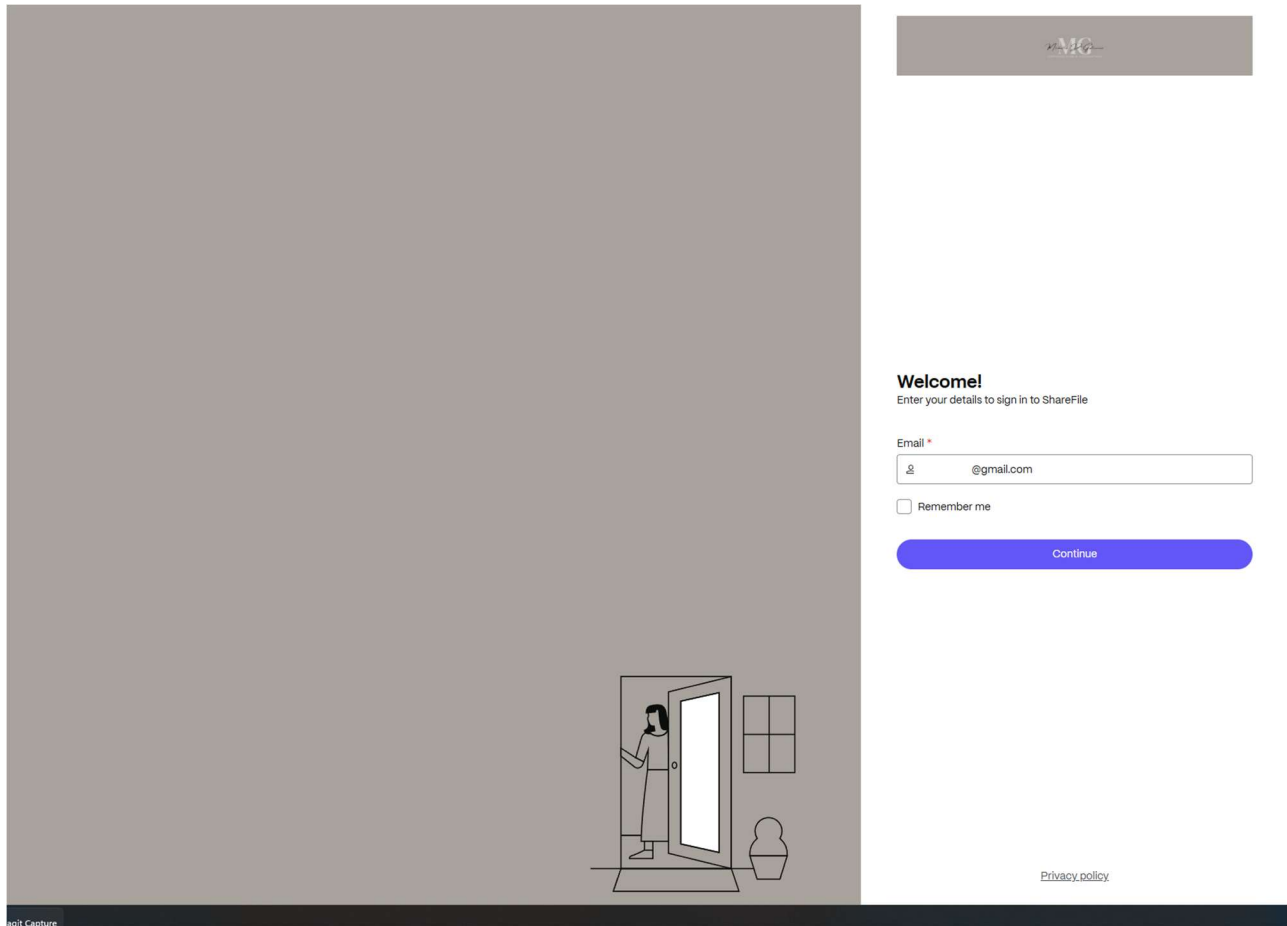
Log in to securely access your tax returns, organizers, and other important documents via ShareFile.

[Access Sharefile](#)

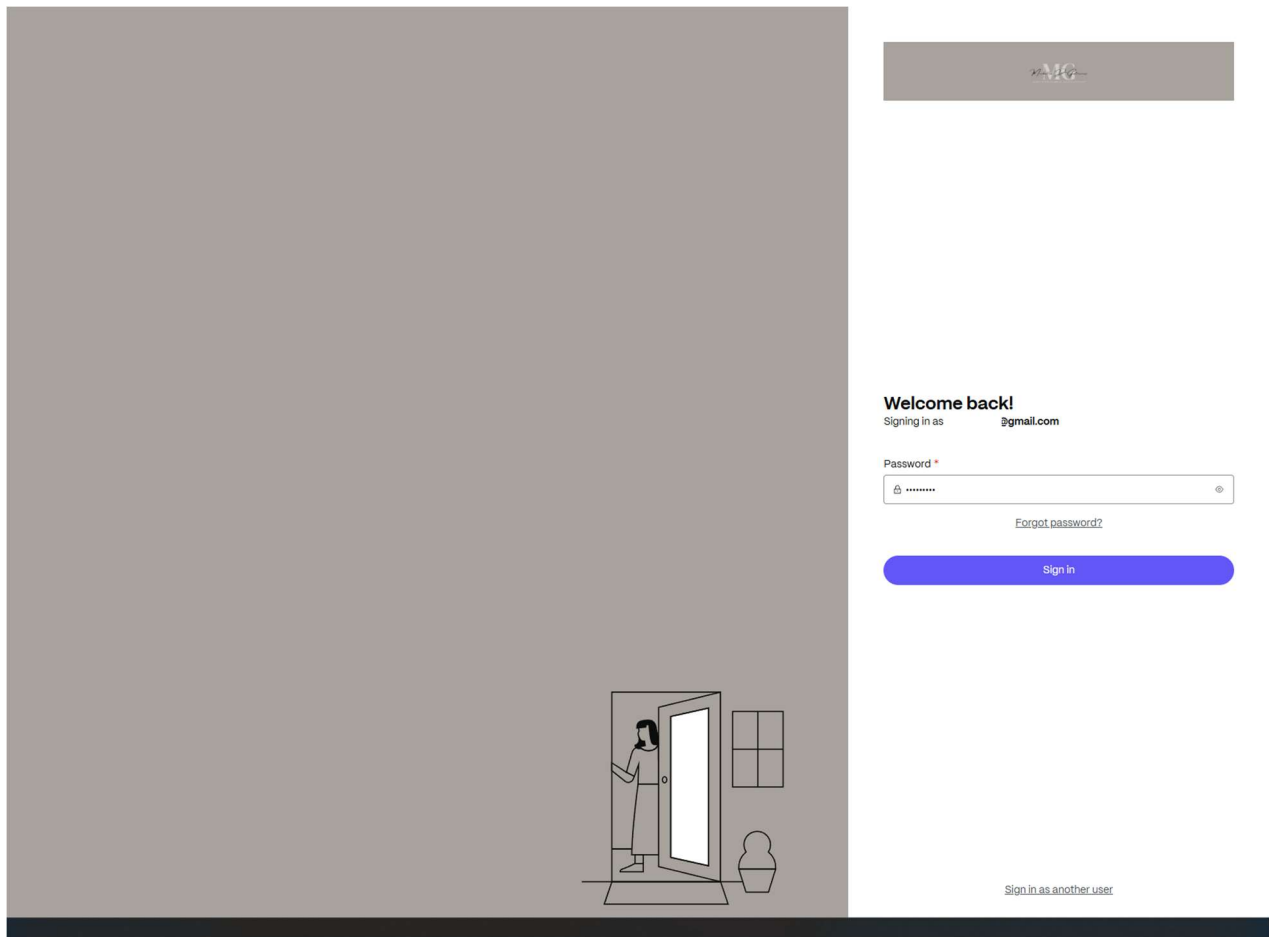
[ShareFile Instructions](#)

[Send Files without Logging in](#)

Step 2: Once on the next page there are three links to “Access ShareFile”, “ShareFile Instructions”, or “Send Files Without Logging in”. To login into ShareFile account click on “Access ShareFile” button.



Step 3: After clicking on “Access ShareFile” it will ask to you enter your email for the account.



Step 4: After entering your email, enter the password for that email account and click “Sign In”.



Verify your identity

Enter the verification code.

☐ Don't ask again on this device

Code sent as SMS to

XXX-XXX-5014
Phone number

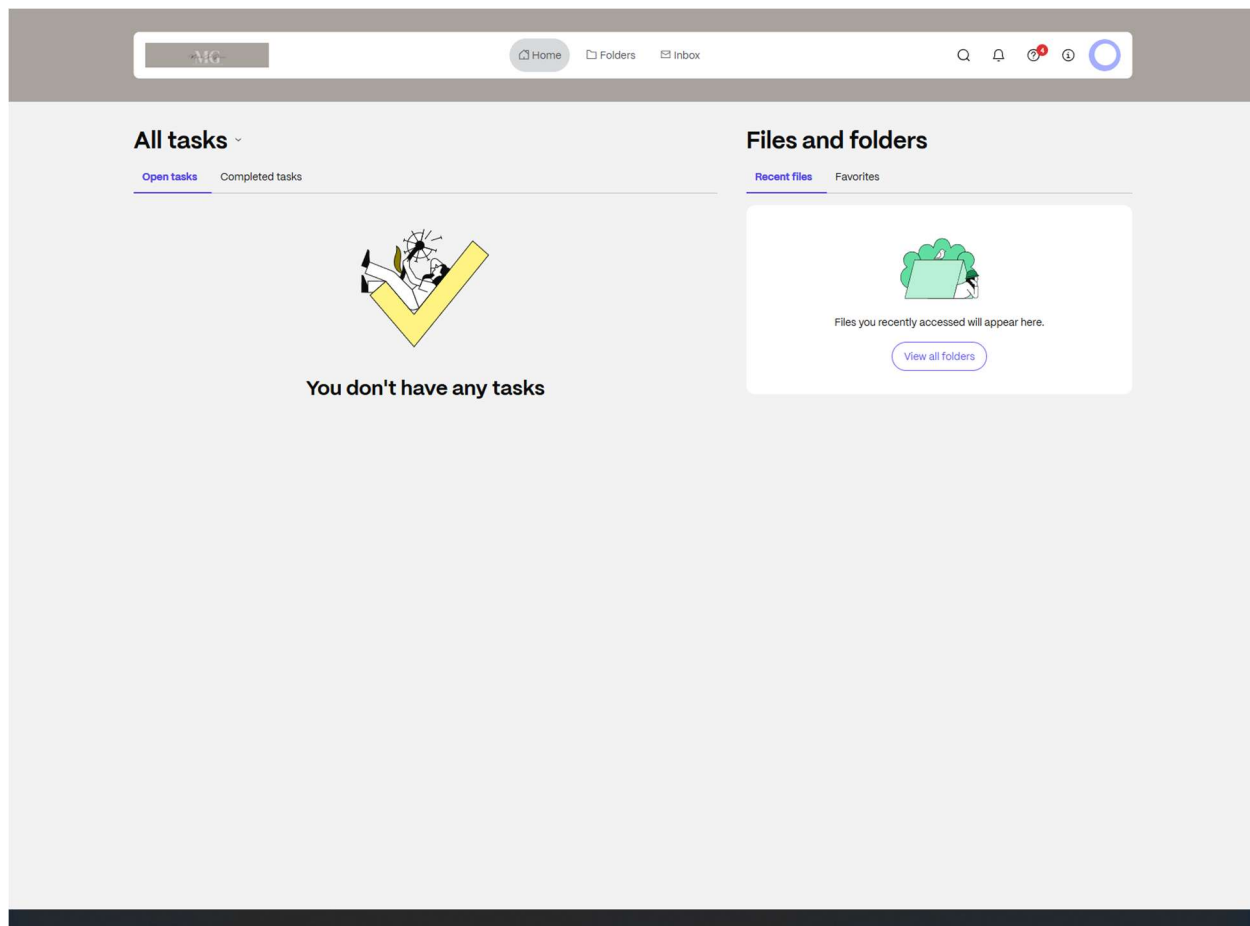
[Resend code](#)

[Send code with voice call](#)

[Sign in](#)

[Sign in as another user](#)

Step 5: To verify your identity, you will need to enter a 6-digit code that was sent to your phone number displayed, and press “Sign In”.

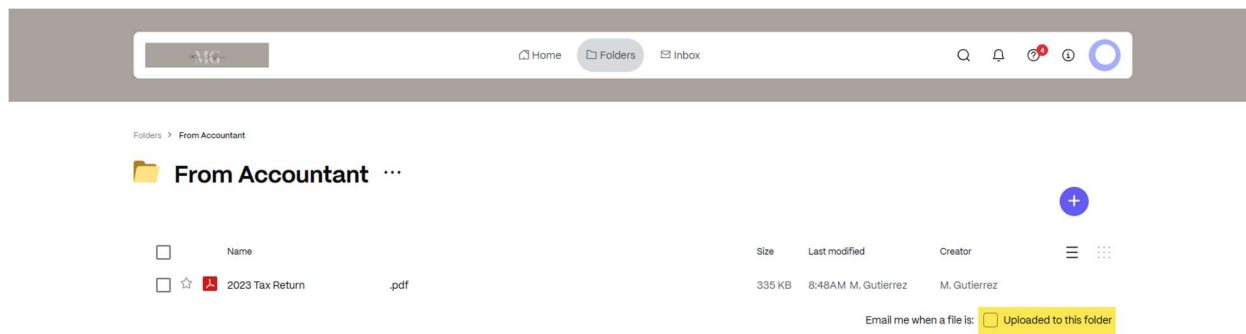


Step 6: After the sign-in steps it will take you to the ShareFile homepage.

Folders

Name	Size	Last modified	Creator		
☆ From Accountant	0 B	01/23/2024	M. Gutierrez	M. Gutierrez	

Step 7: In the top-center of the page there are options “Home”, “Folders”, and “Inbox”. Click on the middle one titled “Folders” to take you to folder view.



M. Gutierrez

Step 8: After clicking on the “Folders” tab, there will be a folder named “From Accountant”. If you click on that folder, it will take you to your important file documents.