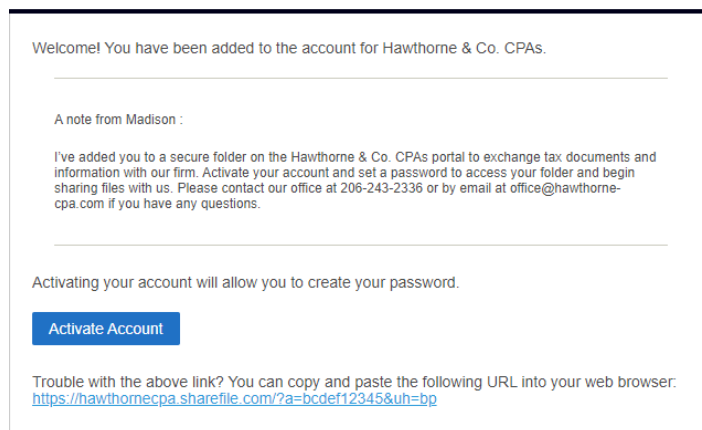# Getting Started with your Hawthorne & Co. CPAs ShareFile Portal

Here are some basics of ShareFile to help you get started accessing, downloading, and uploading files faster as a Client user.

Activating Your Account

1. You will receive a Welcome Email from ShareFile Support that will contain a link to activate your account and create your password.

2. Click on the Activate Account button in the Welcome Email within 30 days of receiving the email.

3. You will be prompted to confirm your personal information and choose a verification method (text message or voice call).

4. A verification code will be sent to you via your chosen method, enter the code to continue.

5. Set a password based on the requirements, then log in.

Still need help?

Contact our office at 206-243-2336 or email us at <u>office@hawthorne-cpa.com</u>, or search through and access hundreds of support articles at the <u>ShareFile Knowledge Base</u>.

Hawthorne & Co.
Certified Public Accountants

How to Log In

1. Enter the URL of the our company's ShareFile account in any web browser. Hawthorne & Co. CPAs ShareFile URL is '**hawthornecpa.sharefile.com**'

   You can also access the portal by going to our website and clicking the **Client Portal** button at the top of the web page.

2. Enter your username as your email address associated with the account.

3. Enter your password, and click **Log In**. You will be taken to the Dashboard menu.

   If you cannot remember your password, click **Forgot Password**.

Account Dashboard

1. The Dashboard is the first page that all users see upon signing into the ShareFile account.

2. Menu items and buttons will be displayed depending on your account permissions and abilities as set by the Administrator.

3. Recent Files will display up to 5 files that you previously accessed from the current web browser.

4. Use the navigation menu on the left side of the page to access folders and settings. If you do not have a page or menu, consult with an Account Admin about obtaining privileges.
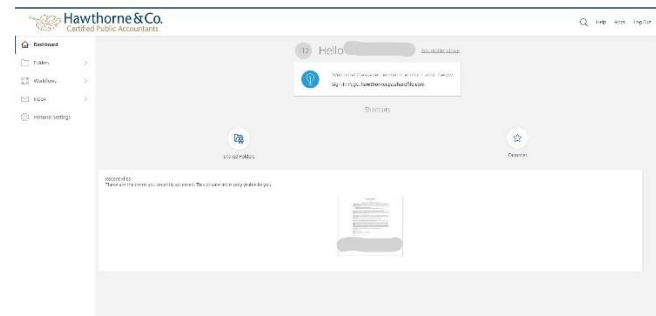
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How to Upload Files in Your Account

1. You may only upload files to folders where you have been given the **Upload** permission.

2. Once logged in, navigate to the folder where you wish to upload files.Since you are a Client user, your folder(s) will be located in the **Shared Folders** section of the account

   If you do not have folders to access, no folders have been shared with you, yet.

3. Access the blue Action Button (+) and select **Upload**.
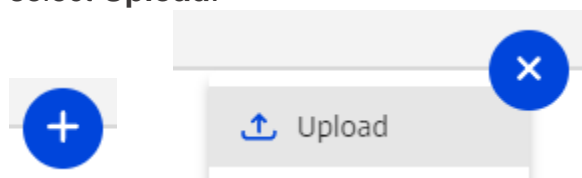
4. Drag your files from your computer into the **Drag Files Here** area, or click **Browse** files to select them manually. Click upload when ready.

   Your files will be uploaded. File upload speeds can vary based on your internet connection.

How to Download Files from Your Account

1. Navigate to the folder in your ShareFile Account that contains the file you wish to download.

2. To download a single file, **right-click the file and select the Download option.**
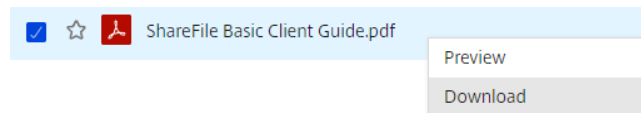
   To preview the file before downloading it, simply click the file name once, or right-click the file and select the Preview option to open it in the Content Viewer. From the viewer, click the Download button on the right.
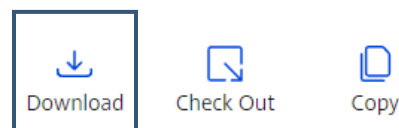
   Note – You can download multiple files at once by using the checkboxes on the left side of each file name. Select the files then click the Download button that appears in the content menu above the file list.

3. The file(s) will be downloaded to your computer. Depending on your browser settings, you may be prompted to select where files should be downloaded to.

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