ShareFile Client Guide

Welcome to Wipfli Sharefile. This 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 and using subfolders

Activating your Sharefile account

Once a Wipfli associate sets up your account, you will receive an email from ShareFile 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 wipfli.com, clicking on Client Login and entering your credentials.

Note: If you have trouble receiving the activation email, please verify that the following email addresses are not blocked by your spam filter.

- *.sf-notifications.com
- mail@sf-notifications.com
- noreply@sf-notifications.com

Access ShareFile configuration information here.

* Wipfli has implemented mandatory two-factor authentication for all clients in our SF instance. After they click on activate account, they will be prompted to enter a phone number and can choose SMS or voice call. Once they sign in, they can then change to an authenticator app if that is preferable.

From: "Wipfli Employee Name" <mail@sf-notifications.com>
Date: June 1, 2017 at 9:22:11 AM CDT
To: Your Email Address
Subject: Wipfli Employee Name has shared the folder '12345 ABC Co Audit' with you.
Reply-To: Wipfli Employee email address

Example of the header of the email

👥 External   **ShareFile Login Information**

○ **Wipfli Associate**   Friday, October 6, 2023 at 1:27 PM
To: Your Email Address

ⓘ Retention: Email Retention Expires: 10/05/2027.

WIPFLI

Wipfli Associate has sent you files using ShareFile.

You will receive another email shortly with a download link that will require you to log in. To receive your login credentials, you must first activate your account and set your personal password. **This link is unique to you and must be used within the next 30 days.**

❯ **Click here to activate your user account**

ShareFile is a tool for sending, receiving, and organizing your business files online. It can be used as a password-protected area for sharing information with clients and partners, and it' an easy way to send files that are too large to e-mail.

Trouble with the above link? You can copy and paste the following URL into your web browser:

Used by Wipfli This tool is used for sending, receiving, and organizing your business files online. It can be used as a password-protected area for sharing information with clients and partners, and it's an easy way to send files that are too large to e-mail.

WIPFLI

Downloading files

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.

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.

If you choose to open the file rather than save, you can save the file to your computer once it is open.
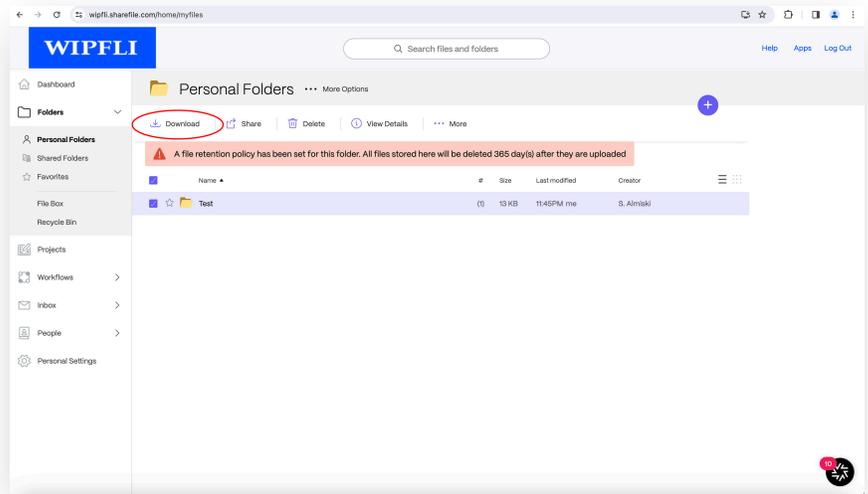
Uploading files

Enter a folder by clicking its title on the home screen.

Click the **purple + symbol** and then click **upload.**

Drag files in or click **browse files** and then select the files from your computer that you would like to upload.

Click **upload files.**
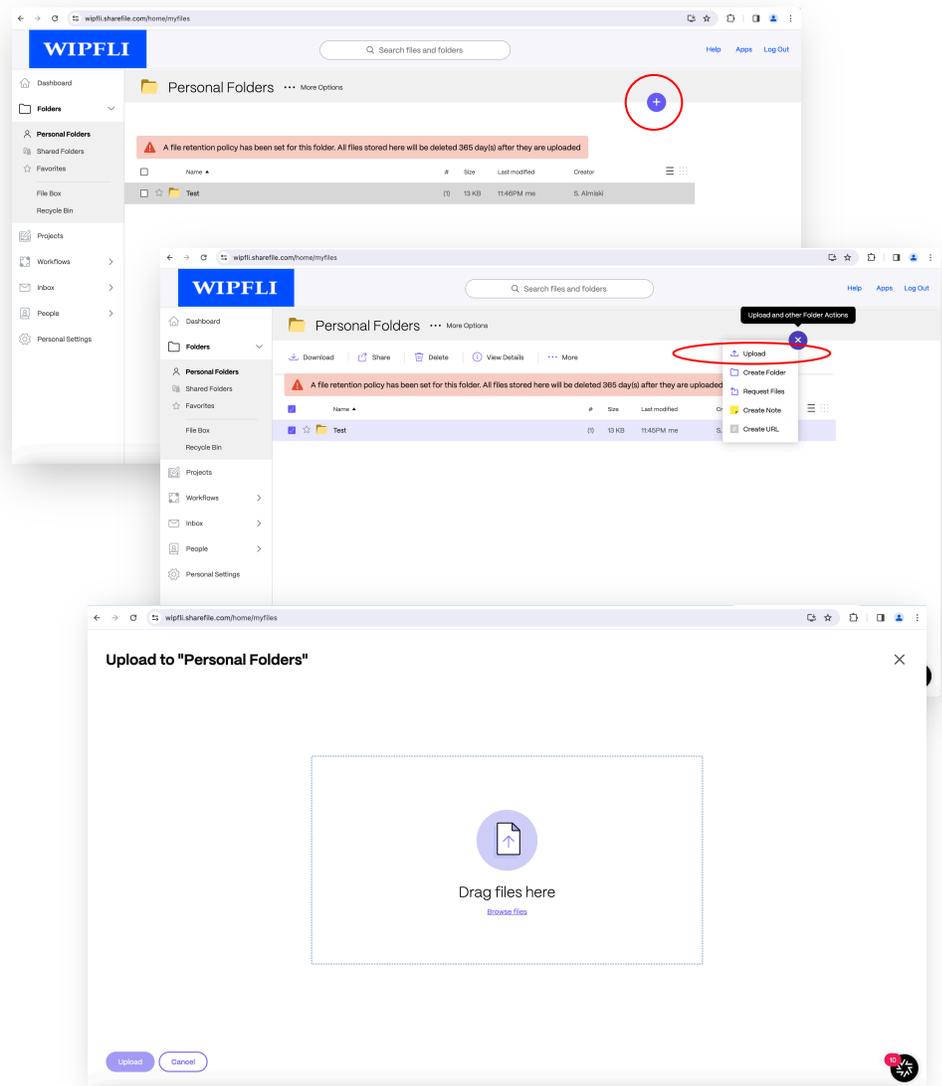
Using favorite folders

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.
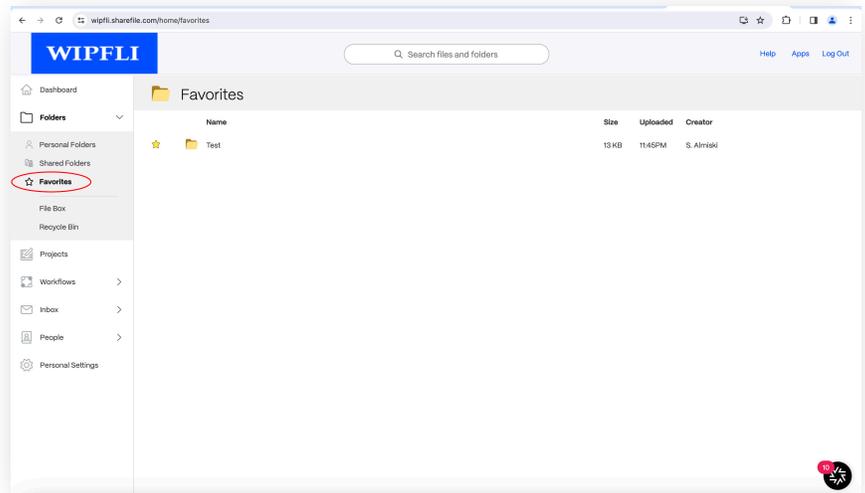
Creating and using subfolders

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

Here's how:

1. Click **create folder.**

2. Enter a folder title or name.

3. Click **add folder.**
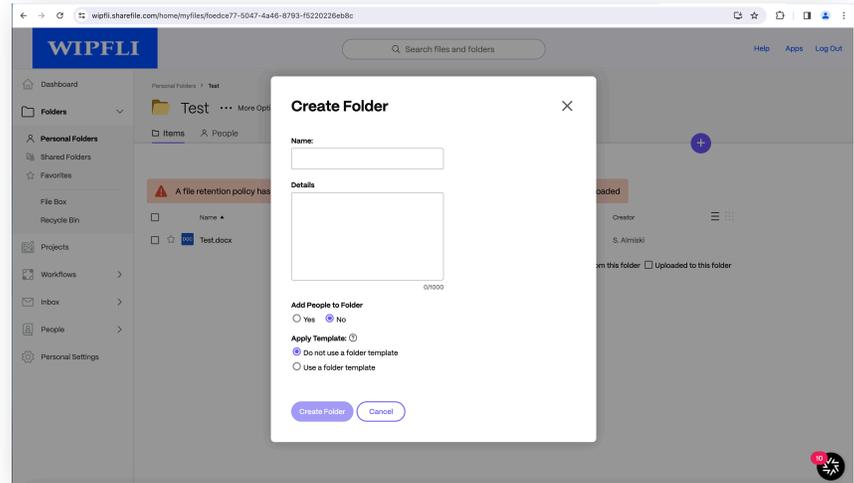
Using: We suggest setting up at least two folders inside each client folder.

1. Folder 1 = Send to Wipfli

2. Folder 2 = Send to client

This will help keep the back-and -forth cleaner and allow you to set up notifications on the subfolders as you see fit.