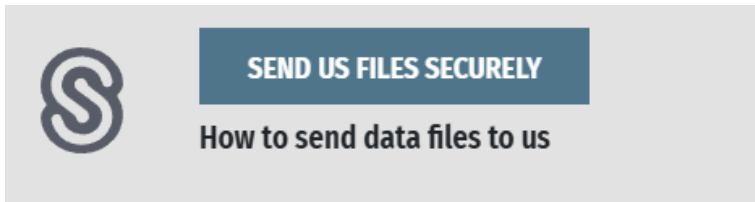


ShareFile Q&A

1. **Question:** What is the best way to send documents?

Answer:

The most efficient way of sending us documents is all at once through our Sharefile drop box. This saves us time and is reflected in your bill. The Sharefile drop box can be found on our website under “Contact” in the top menu, then select “Send Us Files Securely”.



Please then enter your email name and the company you are sending it for (ignore the company field if only sending on behalf of an individual).

Select the recipient you wish to send documents to. “Admin, Reception” goes directly to our receptionist.

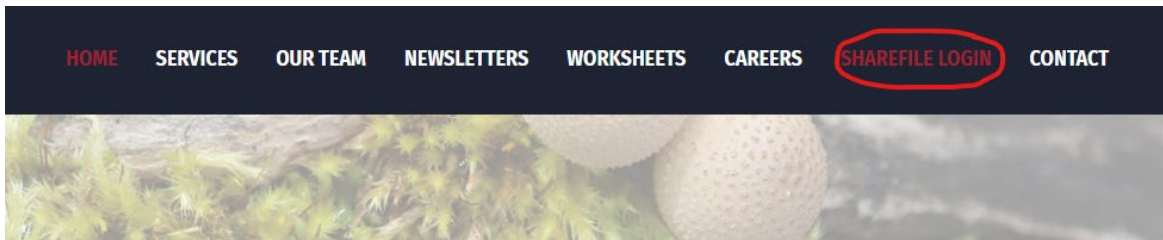
Drag and drop the files you would like to send (or select “Browse files”).

Click “Upload” button once you’ve selected all the files you wish to send us.

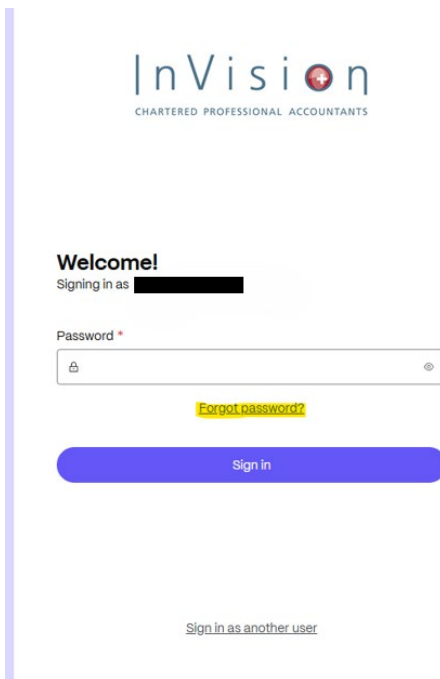
2. **Question:** How do I reset my Sharefile Password?

Answer:

Step 1: On our website page select “Sharefile Login” from the top menu.



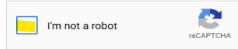
Step 2: After logging into your account it will ask you for a password, underneath the “Password” box there is a “Forgot password?” option, click on that link and it should bring you to the next step.



Step 3: At the next screen, click “I’m not a robot”. Complete the security verification then hit Send.

Resetting your password

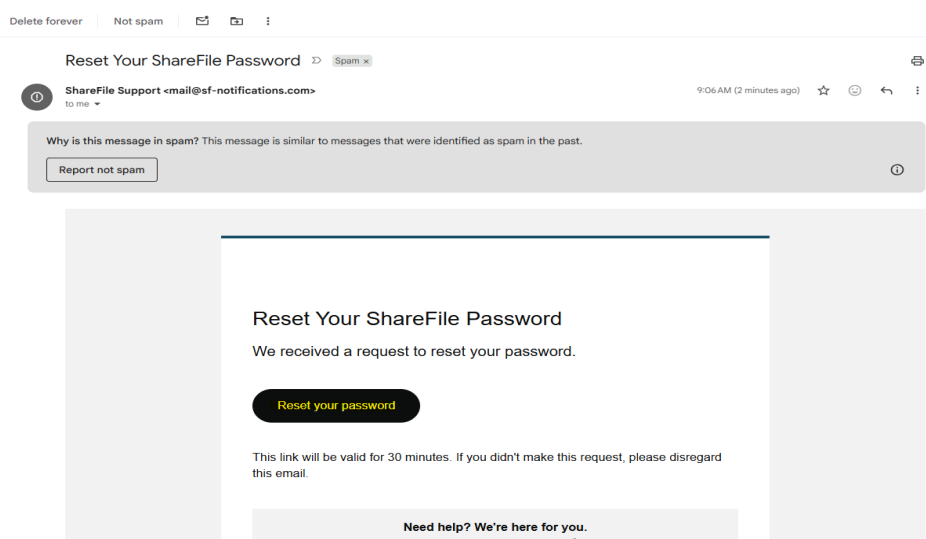
We'll send an email to [REDACTED] so that you can reset your password.



Back

Send

Step 4: You will receive an email from Sharefile with a reset your password link. Check your spam or junk folder too. The link DOES expire automatically.



Step 5: You will then be redirected to a page to create a new password. Ensure it meets all security requirements. “Reset password” button will appear colored once all password security requirements are met.

Reset your password for [REDACTED] on ShareFile
(invisioncpa.sharefile.com)

Password *

Confirm password *

Passwords must meet the following requirements:

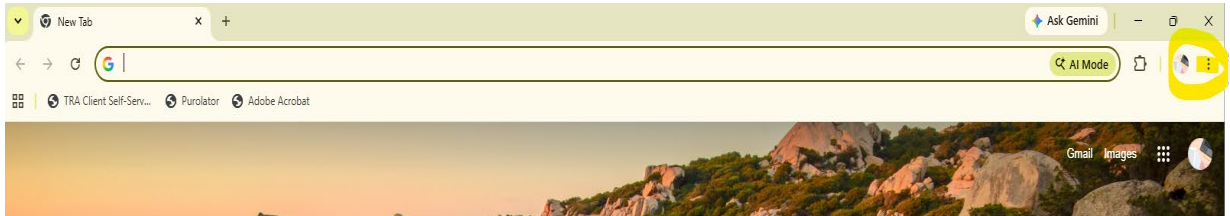
- Include at least 1 upper case letter
- Include at least 1 lower case letter
- Include at least 1 number
- Include at least 1 special characters
- be at least 8 characters long
- Passwords should match

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

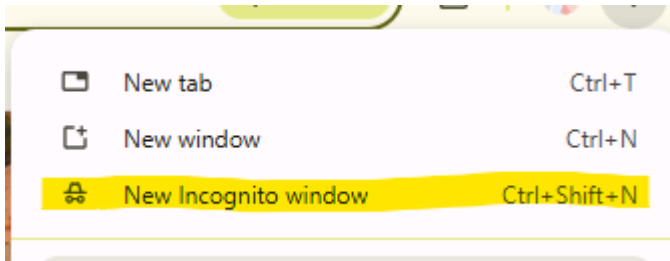
Reset Password

If you get an error message saying the password cannot be reset, try these solutions:

1. Put your browser into “Incognito” mode. For Google Chrome, select the ellipses (“...”) on the top right side of the screen (if you are using a laptop or desktop).



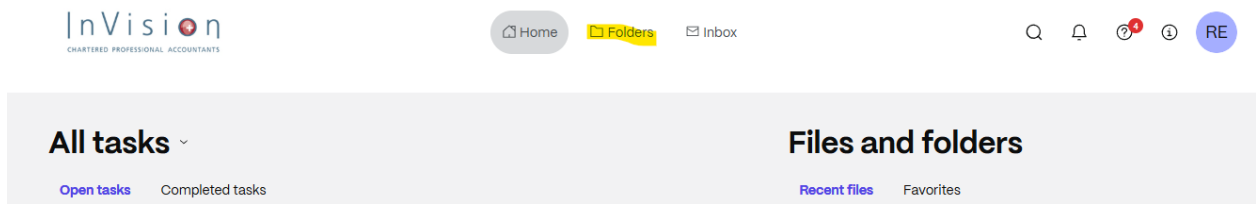
It will then give you a drop-down menu and you will select the “New Incognito window” option. You will then follow the same steps above in the new browser window.



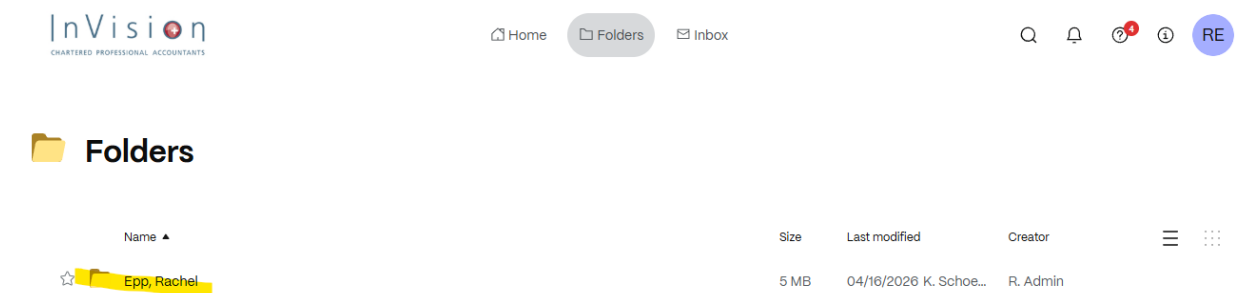
2. If you are using the incognito browser and still get the same message when trying to change the password, make sure your password does not have any consecutive numbers, i.e. “123”, “111”, “22” etc.

3. **Question:** How do I download my documents?

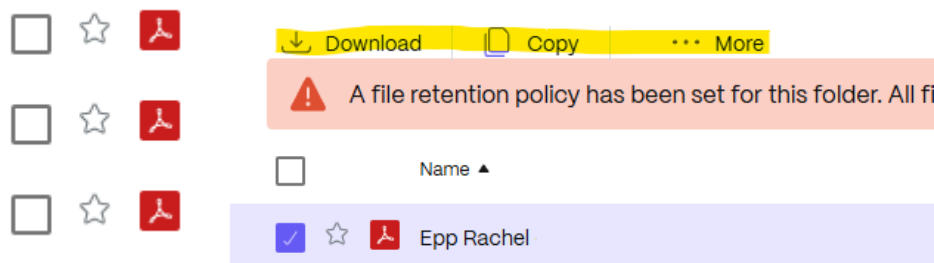
Answer: Once logged into Sharefile, select “Folders” from the top menu bar.



You will now see all the folders that you have access to. Click the folder you wish to access.



There will be a blank box to the left of the documents within the folder. Select the documents you wish to download. Once selected, you will have the option to Download, Copy, or More.



By selecting the “Download” option will immediately begin the download and be saved to your browser’s default file location. i.e. your desktop or your downloads folder.