



Integrated Tax Consultants, LLC

SHAREFILE USER GUIDE

This document should serve as a guide for everything you need to know to get started with ShareFile, including:

- Activating your account
- Where to log-in to your account
- How to navigate your ShareFile Dashboard
- How to access and upload your files

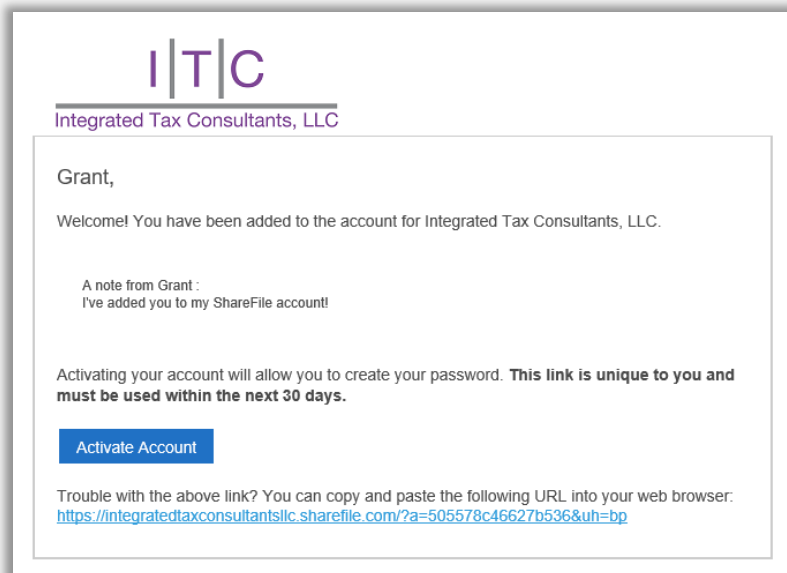
INTEGRATED TAX CONSULTANTS

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Activating Your Account:

When you are ready to access ShareFile for the first time, you will need to activate your account. You'll receive an email from ShareFile Support, which will direct you to activate your New Client Account. Make sure to check your SPAM, as this email comes directly from ShareFile Support.

You will be prompted to create an account if you've received our welcome letter, or if after you've been sent a document from us to sign. If you don't have an active ShareFile account, please contact us for an invitation.



1. Simply open the email and click on the blue ACTIVATE ACCOUNT button or embed the link into your web browser.
2. Confirm your first and last name along with your company if you have one.
3. Click the gray CONTINUE button.
4. Create a password for your account.
5. Click the SAVE AND SIGN IN button.

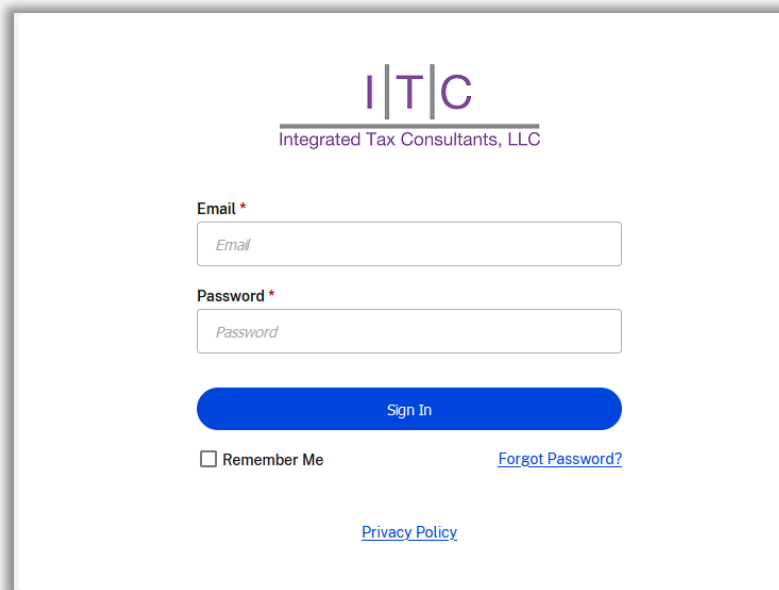
How to Log In:

1. Go to www.itctaxes.com and click the Client Portal button at the top right corner of the page.

OR

Go to www.itctaxes.sharefile.com (it may be helpful to bookmark this link).

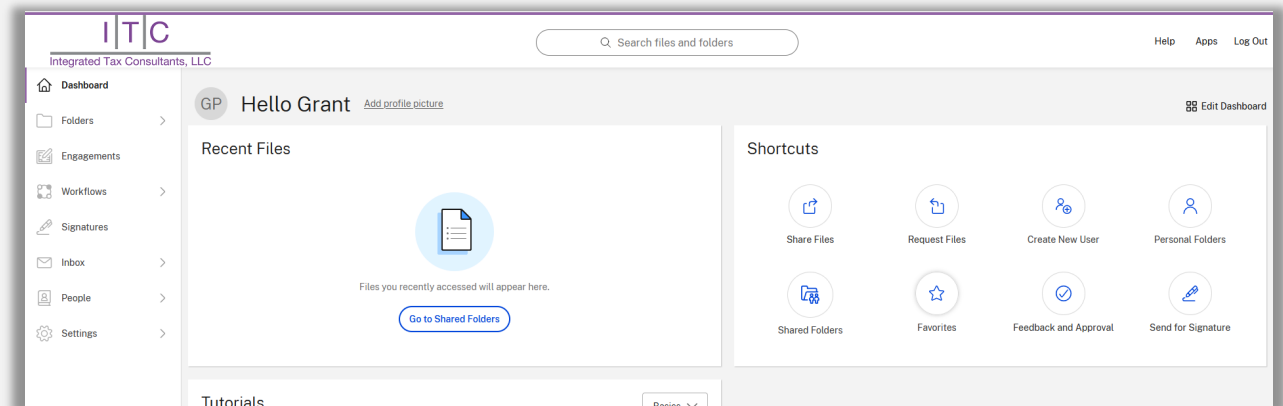
2. Enter your email address and password and click the “Sign In” button.



The screenshot shows the login page for Integrated Tax Consultants, LLC. At the top center is the logo "I|T|C" with the text "Integrated Tax Consultants, LLC" below it. Below the logo are two input fields: "Email" and "Password", both with placeholder text. A blue "Sign In" button is positioned below the password field. To the left of the button is a checkbox labeled "Remember Me". To the right is a link for "Forgot Password?". At the bottom center is a link for "Privacy Policy".

Navigating Your Account:

After logging in, you'll be taken to your FOLDERS menu which is the first page every user will see. This is where you will spend most of your time. However,



it's important to know how to navigate the other important features which you may need.

You may notice the toolbar on the left side of your screen:

- **Dashboard:**
 - Account Home Page
 - Access Recent Files
 - Access Shared and Favorites Folders
- **Folders (Shared)**
 - Access, upload, and download personal and business information.
- **Workflows:**
 - For use by ITC
- **Inbox:**
 - For use by ITC
- **Personal Settings:**
 - Change password
 - Add or edit email address
- **Two-Step Verification**
 - Enable additional security to account

How to Access and Upload Files:

Since you are a client, your folder will be located in the SHARED FOLDERS section of your account under FOLDERS.

You will have a folder with your name on it with sub-folders already created for you! You are welcome to add additional sub-folders under the template we have provided for you.

To Access Your Files:

1. Go to the SHARED FOLDERS
2. Select your folder with your name on it.

To Upload New Files:

1. Open the PARENT FOLDER under SHARED FOLDERS
2. Click on the sub-folder you would like to upload files to.
3. Click on the blue PLUS button on the upper right side of the page. This will reveal a dropdown menu.
4. Click the UPLOAD link which will take you to a file uploader.
5. Drag your files directly into the box.
You can also delete individual items, edit an item, clear all of the items, and add more files from another location.
6. Once all of the files are added, click on the blue UPLOAD button located at the bottom left corner of your screen.

If you accidentally upload the wrong file, simply click on the box next to the file to create a blue check. A new menu will appear, and you can click on the TRASH button to delete it.