

ShareFile - Client Guide

Uploading Files

Uploading Files from an Emailed Link

If you have been emailed a link to upload files, click on the link in the email and follow the on screen upload instructions.

Uploading Files Using Quick Upload

You may upload files to us by using the quick upload feature found on our website - <http://www.oacpas.net/sharefile.php>. This option allows you to upload files to Ouellette & Associates, P.A. without the need of logging in to ShareFile. The files will be timely routed to the recipient.

- 1 Fill out the required fields (Your email address, your first name, your last name, and your company)
- 2 Click on the browse button to choose the files you wish to upload. You may upload 5 individual files using this method. If you need to upload larger batch files, you may wish to use the registered user login method below.
- 3 Once all files have been chosen, click on the upload files button.

Registered User Upload

If you have access to upload into a folder on ShareFile, you can use the following instructions to upload files into the ShareFile account. Refer to the "Logging In" instructions below for further help.

To Upload and Store a file online after logging into your ShareFile account:

1. Enter a folder which you created by clicking on it.
2. Click the "Upload Files" button.
3. Click the "Choose Files" button and select the files from your computer.
4. Optionally you can choose a title for the file.
5. In the description box, note the recipient's name of the file.
6. If you check the box to email users, all users who have access to the folder will be sent a brief notification that a file has been uploaded.
7. Click the "Upload Files" button.

Logging In

Note: You may have been emailed a request to download or upload a file without being sent any login information. If this is the case, you do not need to worry about a username and password, simply click on the link provided and follow the onscreen steps.

If you have been set up with a client user account, you may log in from one of two places:

1 <https://oacpas.sharefile.com> - this will be provided to you in an email from Ouellette and Associates with your client user account information.

2 Our web site -<http://www.oacpas.net/sharefile.net> Your username is your email address. Your temporary password to get started will be emailed to you by Ouellette and Associates. If you have not received your password, you may either:

1. Email sharefile@oacpas.net or
2. Click on the "Forgot your password?" link under the login.

The first time you log in, you will be prompted to choose a permanent password.

My Settings

The following are available through the "My Settings" link on the navigation:

1. Edit Basic Info

You can set or change your name in the system.

2. Change Password

You may also reset your password. Passwords must be between 4 and 15 characters in length.

3. Change upload preferences

You can change the upload component that is used for your user account.

Upload Components

There are currently 3 different upload components available:

1. Standard Upload

This is an upload component that does not require any plug-ins to be installed on your computer. You can only upload one file at a time with this component.

2. Enhanced Flash Upload

Requires Flash Player 8 or above. This component allows you to select multiple files to upload at one time, instead of one file at a time. However, you cannot select a folder and have all the contents of the folder be uploaded. Due to a security bug, this option will not work with the Fire Fox browser.

3. Enhanced Java Upload

Requires latest version of the Java Runtime Environment. This component will work with any browser and has all the capabilities of the Enhanced Flash Upload plus some additional features. This component will allow you to upload entire folder structures, as well as retries in case your internet loses connectivity for a brief period of time. This component is currently in the beta development cycle, but all users are welcome to enable this component for their user account.

Notes and URLs

In addition to uploading files, if you have upload permission to a folder, you can also add Notes and URLs to folders you create. A Note is simply a textual note. A URL is a link to a web site.

Please note that ShareFile only works with files stored on the computer you are logging in from. Files may be selected only from your local PC or network. You may not use ShareFile with gotomypc or other such sharing services.