

Sharefile Upload Info

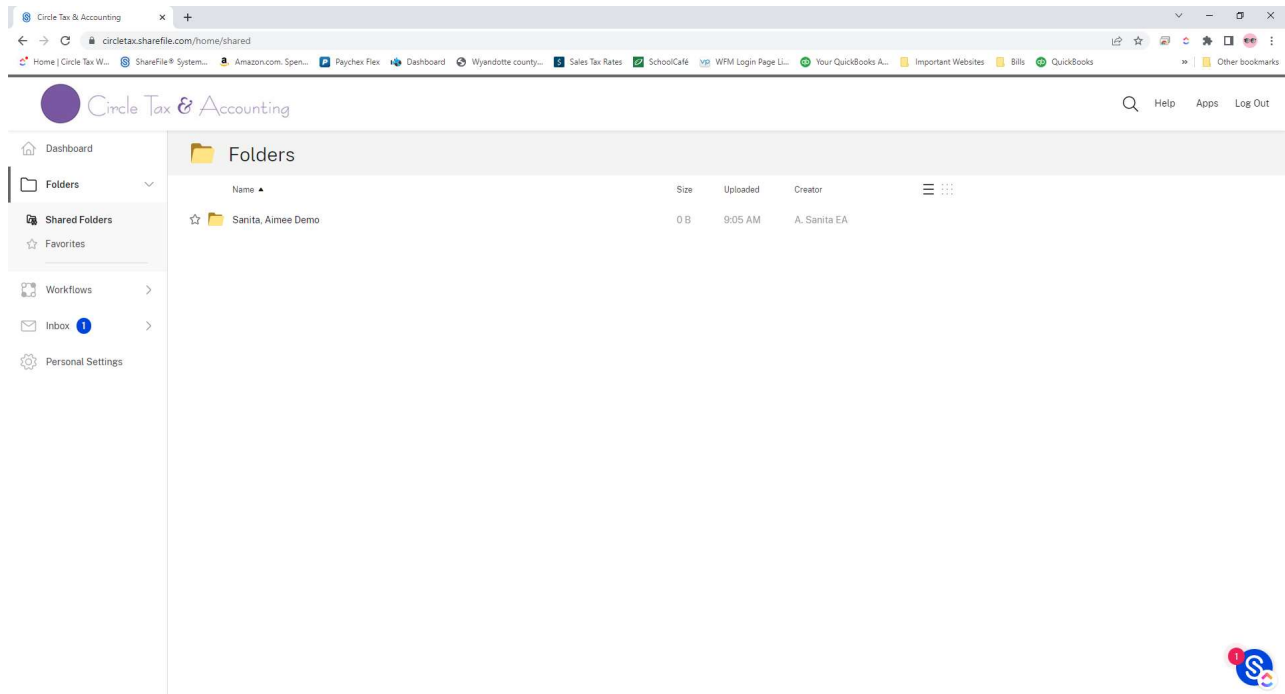
<https://circletax.sharefile.com>

Log into your account with your email and password (you created the password, so if you don't remember it please select forgot password and reset it).



The screenshot shows the login interface for Circle Tax & Accounting. At the top left is the company logo, a purple circle followed by the text "Circle Tax & Accounting". Below the logo are two yellow input fields: the first contains the email address "aimee@circletax.com" and the second contains a masked password "*****". A dark grey "Sign In" button is positioned below the password field. At the bottom left, there is a "Remember Me" checkbox. At the bottom right, there is a "Forgot Password?" link. A "Privacy Policy" link is centered at the bottom.

When you first log in you should see a folder with your name on it. Click on it to open the folder.



The screenshot displays the dashboard of the Circle Tax & Accounting system. The browser's address bar shows the URL "circletax.sharefile.com/home/shared". The dashboard header includes the company logo and navigation links for "Help", "Apps", and "Log Out". A left-hand sidebar contains menu items: "Dashboard", "Folders", "Shared Folders", "Favorites", "Workflows", "Inbox", and "Personal Settings". The main content area is titled "Folders" and features a table with the following data:

Name	Size	Uploaded	Creator
Sanita, Aimee Demo	0 B	9:05 AM	A. Sanita EA

A small circular icon with a blue and red design is located in the bottom right corner of the dashboard area.

You will see a screen with several folders (this is a template, so even if you haven't been a client since 2012 you will still have all these folders).

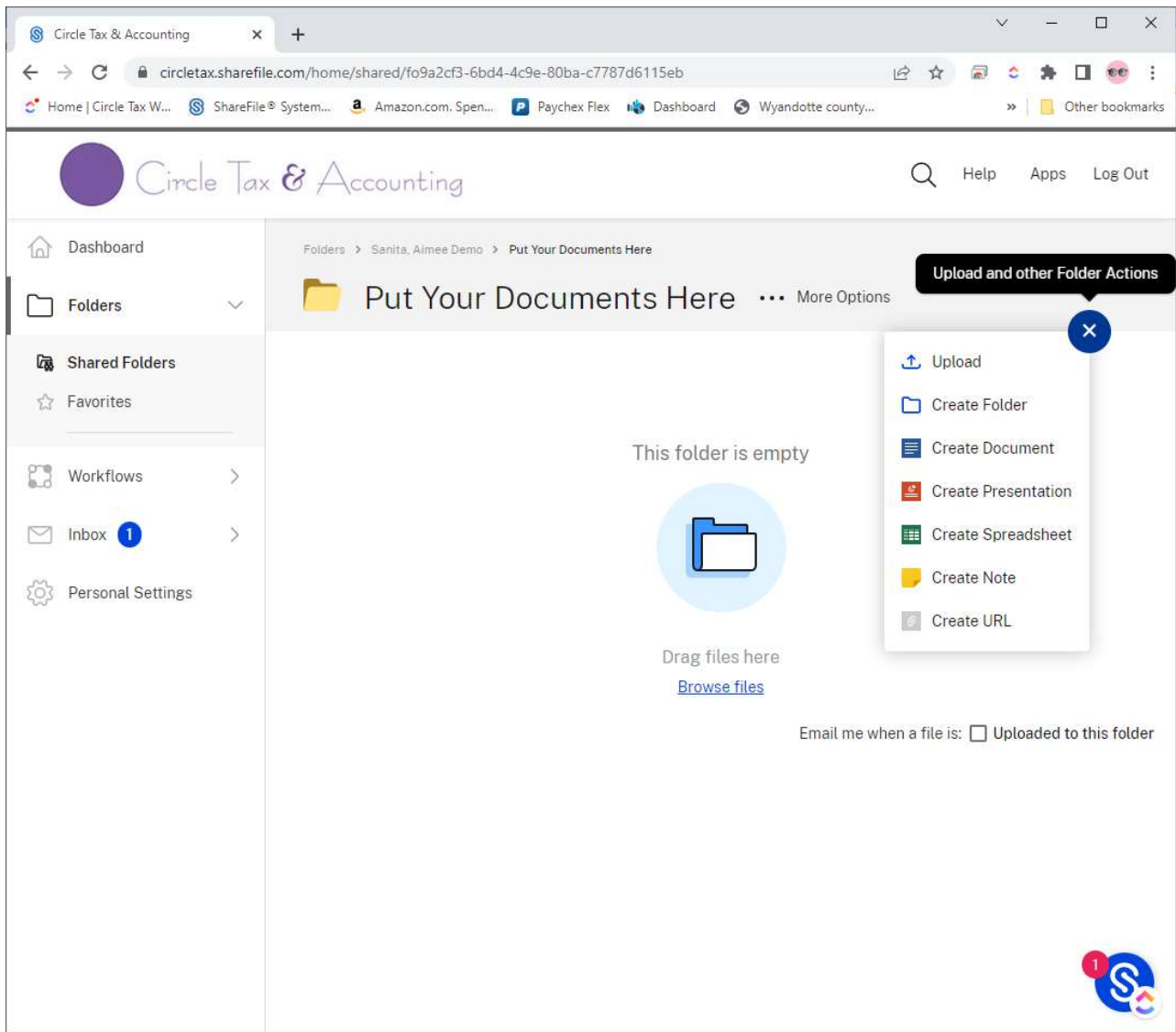
The screenshot shows the Circle Tax & Accounting web interface. The browser address bar displays the URL: circletax.sharefile.com/home/shared/foaa77ec-d61a-428c-bd19-3cb6a7fe1759. The page title is "Sanita, Aimee Demo". The left sidebar contains navigation options: Dashboard, Folders, Shared Folders, Favorites, Workflows, Inbox (1), and Personal Settings. The main content area shows a list of folders under the heading "Sanita, Aimee Demo". The folders are listed in a table with columns for Name, Size, Uploaded, and Creator. The folder "Put Your Documents Here" is circled in red. Below the folder list, there is a checkbox for "Email me when a file is: Uploaded to this folder".

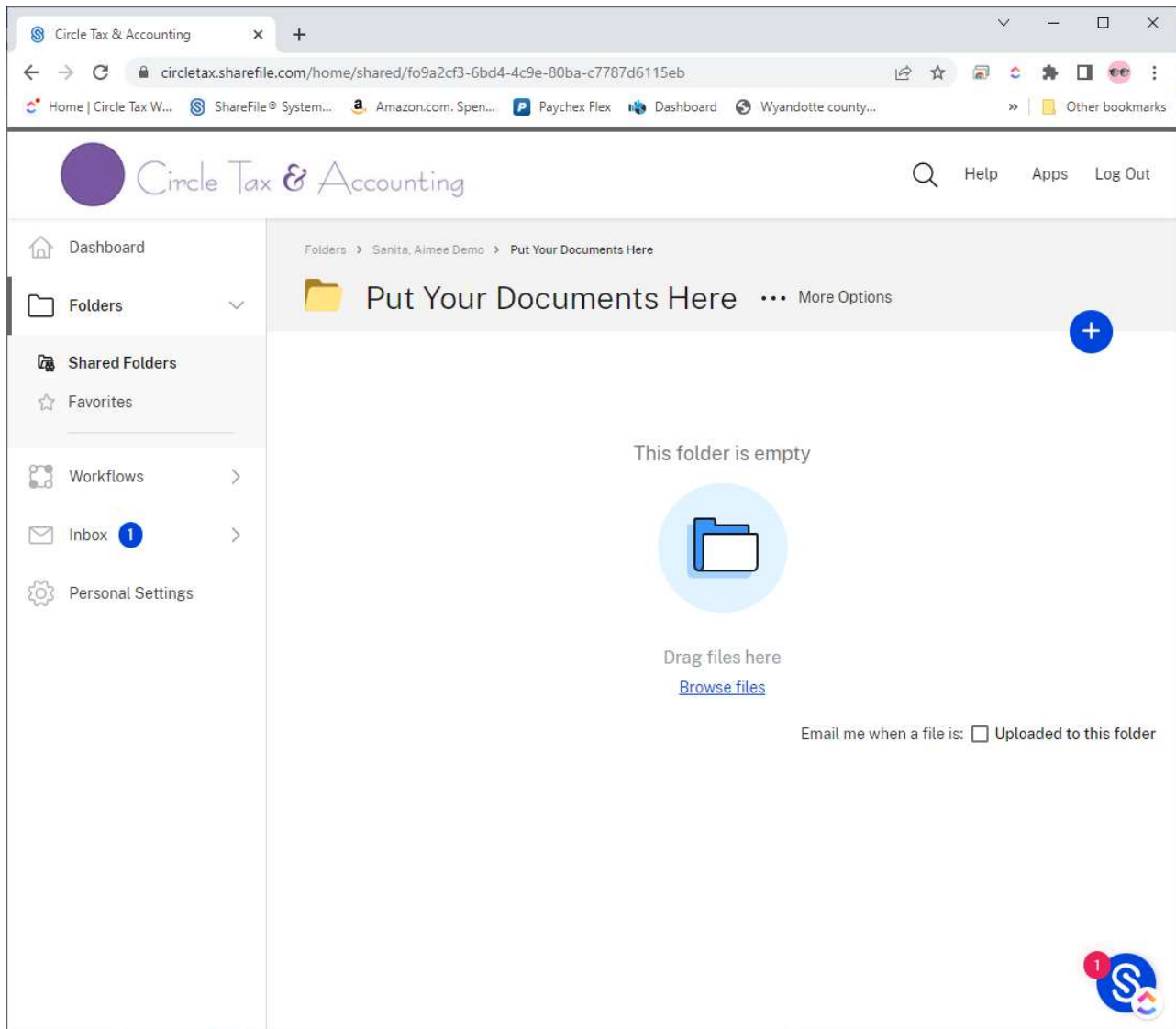
Name	Size	Uploaded	Creator
2019 Taxes	0 B	9:05 AM	A. Sanita EA
2020 Taxes	0 B	9:05 AM	A. Sanita EA
2021 Taxes	0 B	9:05 AM	A. Sanita EA
2022 Taxes	0 B	9:05 AM	A. Sanita EA
2023 Taxes	0 B	9:05 AM	A. Sanita EA
Old Tax Years	0 B	9:05 AM	A. Sanita EA
Put Your Documents Here	0 B	9:05 AM	A. Sanita EA

Email me when a file is: Uploaded to this folder

Step 1: Click on "Put your Documents Here" folder

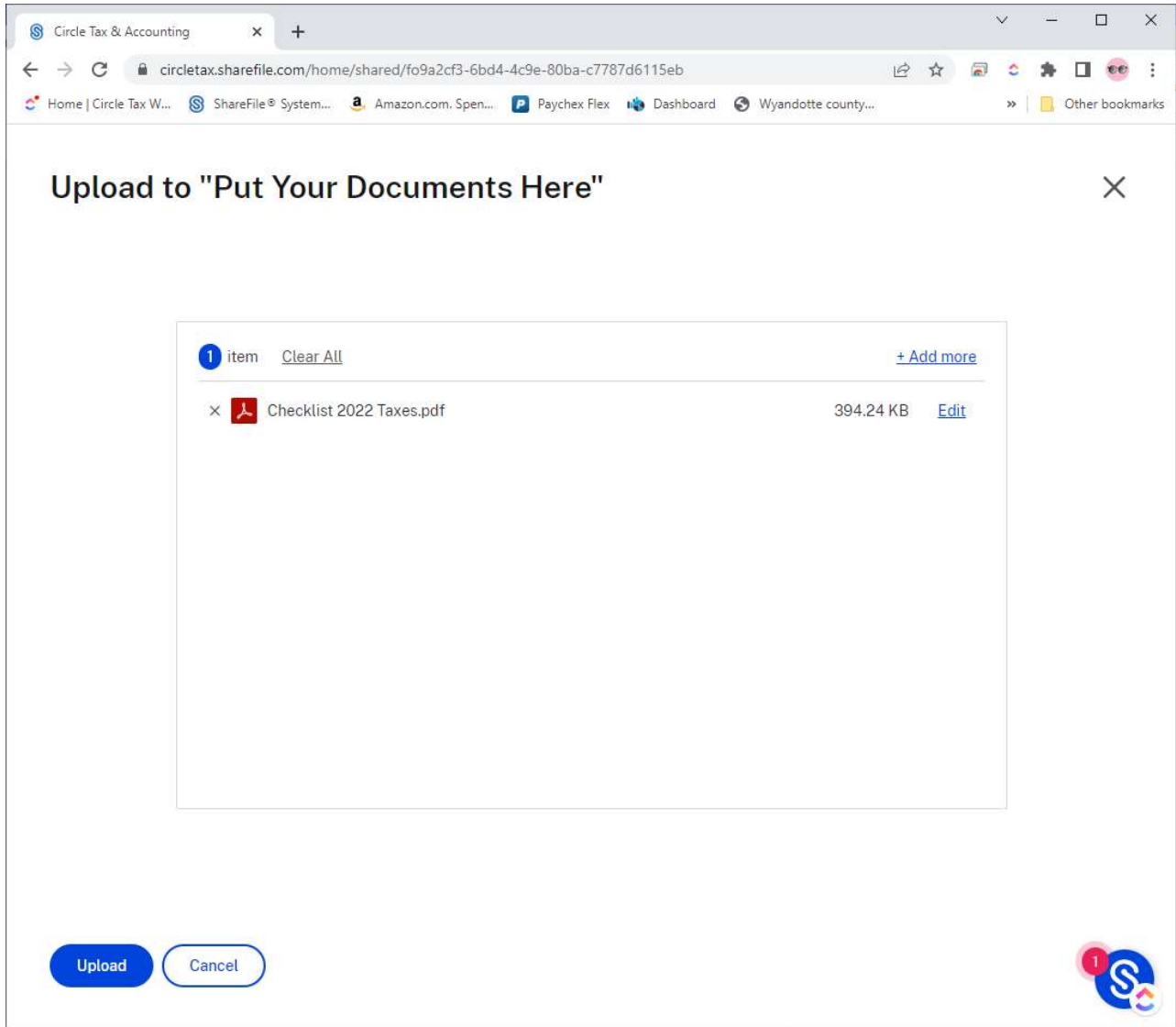
Once in the folder you can upload files. Click on the Blue Circle with the + Sign in the righthand corner and select Upload.





You can simply drag files from another folder on the screen & drop them in the box. Or select "Browse files" and find the files you want to upload from your computer.

Once you selected the files make sure to click upload



****Please note we run windows based computers. We can open PDFs, jpegs, and Office documents. We can't however open Mac documents. If you have a Mac program (like pages or numbers files) please convert the file to either PDF or office file type (word or excel).**

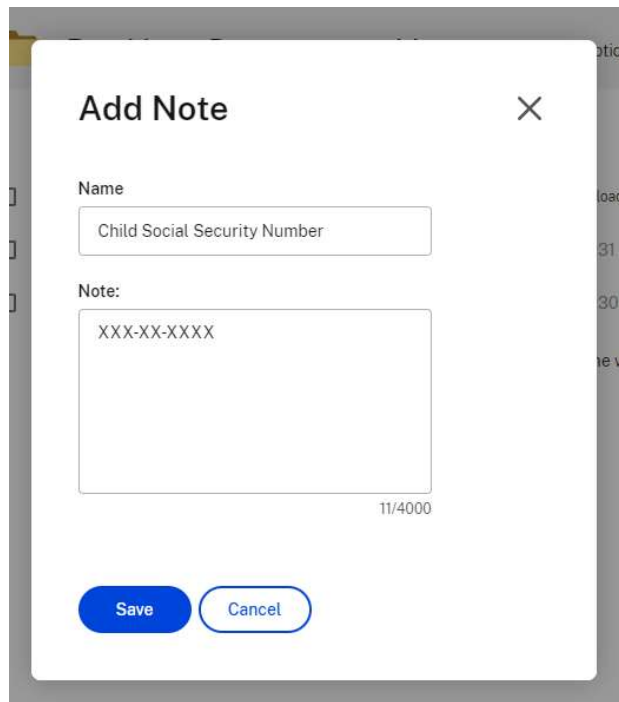
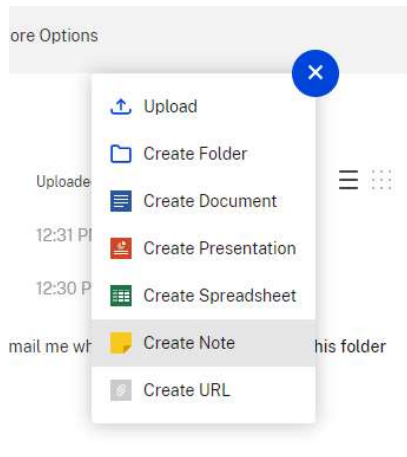
You should now see the documents you have loaded. If you need to load additional documents click the “+” again and repeat the process.

The screenshot displays the Circle Tax & Accounting ShareFile interface. The browser address bar shows the URL: `circletax.sharefile.com/home/shared/fo9a2cf3-6bd4-4c9e-80ba-c7787d6115eb`. The page header includes the logo for Circle Tax & Accounting and navigation links for Help, Apps, and Log Out. A left sidebar contains navigation options: Dashboard, Folders, Shared Folders, Favorites, Workflows, Inbox (with a notification badge), and Personal Settings. The main content area shows the breadcrumb path: Folders > Sanita, Aimee Demo > Put Your Documents Here. Below this is a folder icon and the name 'Put Your Documents Here' with a 'More Options' menu and a blue '+' button. A table lists the files in the folder:

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	⋮
<input type="checkbox"/>	☆ Checklist 2022 Taxes.pdf	394 KB	12:31 PM	A. Sanita	
<input type="checkbox"/>	☆ Info Sheet 2022 Taxes.pdf	675 KB	12:30 PM	A. Sanita	

Below the table, there is a checkbox for 'Email me when a file is:' followed by the option 'Uploaded to this folder'. In the bottom right corner, there is a notification icon for the ShareFile application.

There is an option that says, "Create Note" that you can also use if you have something you need to add to the file but don't have a document. For example, if you normally give me a mileage number, instead of emailing it you can click Create Note and put it in your file.



Confirm everything you need to load is showing up in the window. Once everything is loaded you can click Log Out at the top and close the internet window.

The screenshot shows a web browser window with the following elements:

- Browser Tab:** Circle Tax & Accounting
- Address Bar:** circletax.sharefile.com/home/shared/fo9a2cf3-6bd4-4c9e-80ba-c7787d6115eb
- Bookmarks:** Home | Circle Tax W..., ShareFile® System..., Amazon.com. Spen..., Paychex Flex, Dashboard, Wyandotte county..., Other bookmarks
- Page Header:** Circle Tax & Accounting logo, Search icon, Help, Apps, Log Out
- Left Sidebar:** Dashboard, Folders, Shared Folders, Favorites, Workflows, Inbox (1), Personal Settings
- Breadcrumbs:** Folders > Sanita, Aimee Demo > Put Your Documents Here
- Main Content:** Folder titled "Put Your Documents Here" with a "More Options" menu and a "+" button.
- Table of Files:**

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	
<input type="checkbox"/>	☆ Child Social Security Number	0 B	12:35 PM	A. Sanita	
<input type="checkbox"/>	☆ Checklist 2022 Taxes.pdf	394 KB	12:31 PM	A. Sanita	
<input type="checkbox"/>	☆ Info Sheet 2022 Taxes.pdf	675 KB	12:30 PM	A. Sanita	
- Footer:** "Email me when a file is: Uploaded to this folder" and a ShareFile logo in the bottom right corner.