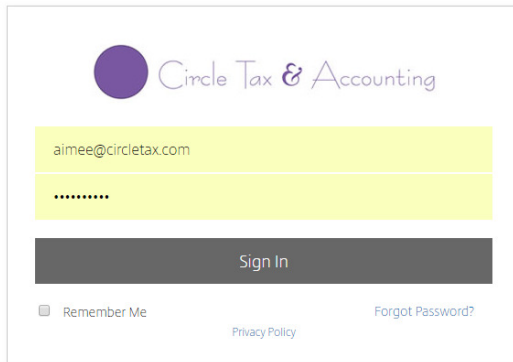


Sharefile Upload Info

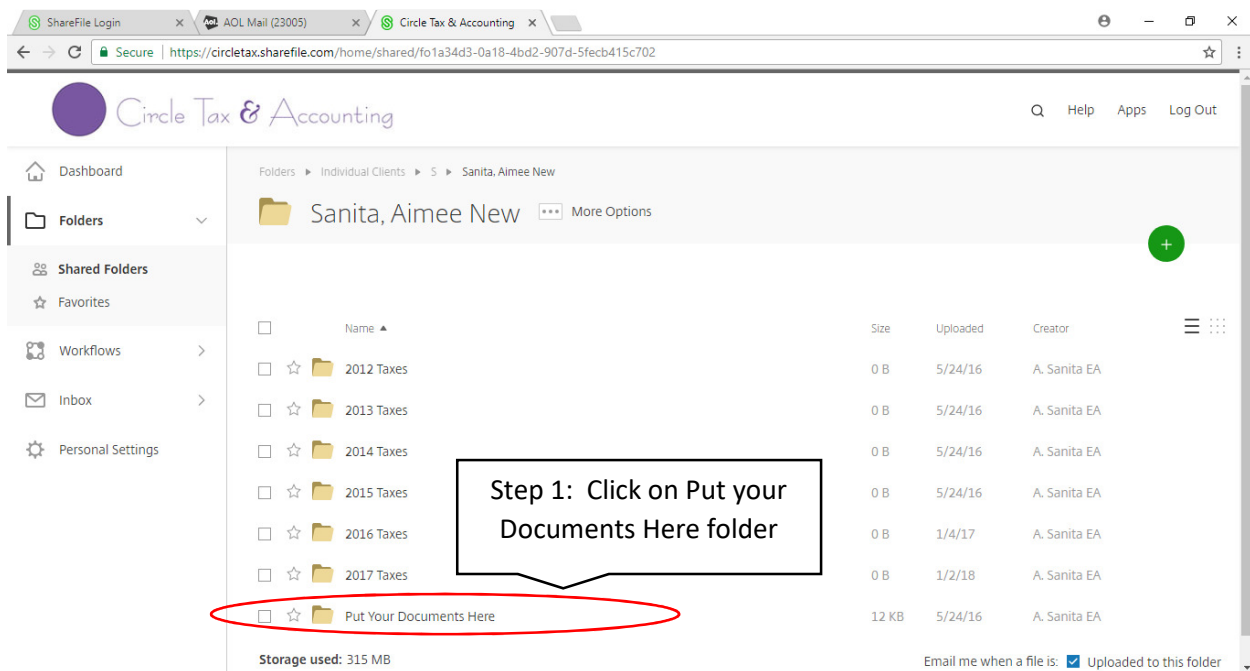
<https://circletax.sharefile.com>

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 login form features the Circle Tax & Accounting logo at the top. Below it 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.

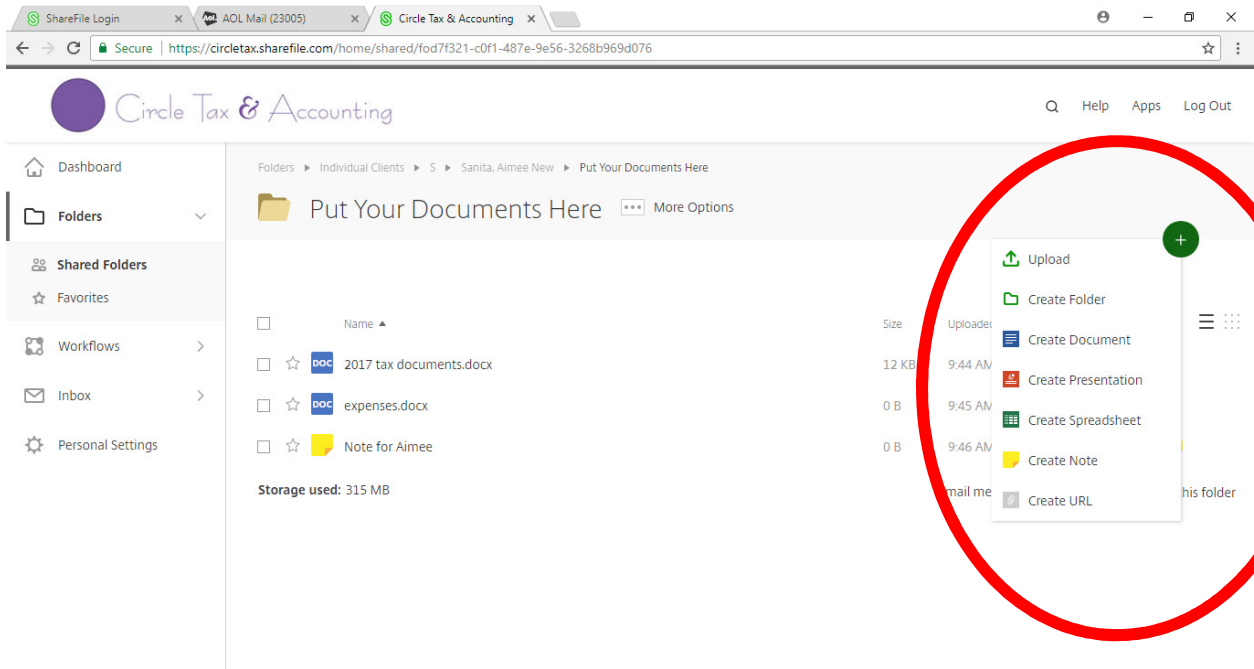
You will see a screen with several folders (this is a template, so even if you haven't been a client since 2012 you will still have all these folders).



The screenshot shows a web browser window with the Sharefile interface. The browser's address bar displays the URL <https://circletax.sharefile.com/home/shared/fo1a34d3-0a18-4bd2-907d-5fecb415c702>. The interface includes a navigation sidebar on the left with options like Dashboard, Folders, Shared Folders, Favorites, Workflows, Inbox, and Personal Settings. The main content area shows a breadcrumb path: Folders > Individual Clients > S > Sanita, Aimee New. Below this, a folder named 'Sanita, Aimee New' is expanded to show a list of folders. A red oval highlights the folder 'Put Your Documents Here' at the bottom of the list. A callout box with a black border and white background points to this folder, containing the text: 'Step 1: Click on Put your Documents Here folder'. The folder list includes columns for Name, Size, Uploaded, and Creator. The 'Put Your Documents Here' folder is 12 KB and was uploaded on 5/24/16 by A. Sanita EA. At the bottom of the interface, it shows 'Storage used: 315 MB' and a checkbox for 'Email me when a file is: Uploaded to this folder' which is checked.

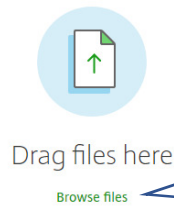
Name	Size	Uploaded	Creator
2012 Taxes	0 B	5/24/16	A. Sanita EA
2013 Taxes	0 B	5/24/16	A. Sanita EA
2014 Taxes	0 B	5/24/16	A. Sanita EA
2015 Taxes	0 B	5/24/16	A. Sanita EA
2016 Taxes	0 B	1/4/17	A. Sanita EA
2017 Taxes	0 B	1/2/18	A. Sanita EA
Put Your Documents Here	12 KB	5/24/16	A. Sanita EA

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



Upload to "Put Your Documents Here"

You can simply drag files from another folder onto the screen & drop them in the box.



Or select "Browse files" and find the files you want to upload from your computer.



Upload to "Put Your Documents Here"

1 item [Clear All](#) [+ Add more](#)

× doc 2017 tax documents.docx 11.59 KB [Edit](#)

Once documents are all on the screen press upload.

[Upload](#) [Cancel](#)

****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).**

Circle Tax & Accounting

Dashboard

Folders

Shared Folders

Favorites

Workflows

Inbox

Personal Settings

Help Apps Log Out

Individual Clients > S > Sanita, Aimee New > Put Your Documents Here

Put Your Documents Here [More Options](#)

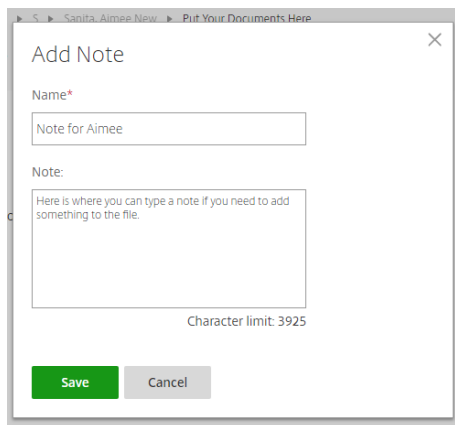
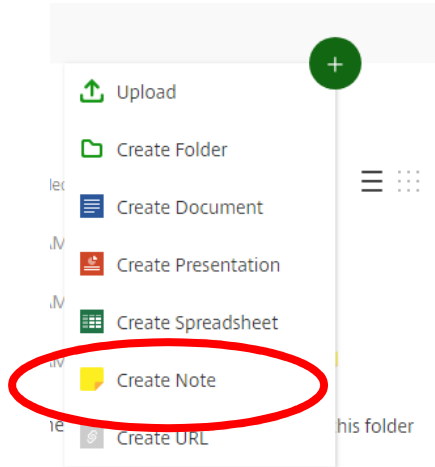
<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator
<input type="checkbox"/>	☆ doc 2017 tax documents.docx	12 KB	9:44 AM	A. Sanita

Storage used: 315 MB

Email me when a file is: Uploaded to this folder

What you see in here is what we will see on the other end, so make sure all your documents loaded correctly.

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.



ShareFile Login AOL Mail (23005) Circle Tax & Accounting Microsoft Word Online

Secure | https://cirtetax.sharefile.com/home/shared/fod7f321-c0f1-487e-9e56-3268b969d076

Circle Tax & Accounting Help Apps Log Out

Dashboard

Folders

Shared Folders

Favorites

Workflows

Inbox

Personal Settings

Folders > Individual Clients > S > Sanita, Aimee New > Put Your Documents Here

Put Your Documents Here More Options

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	
<input type="checkbox"/>	☆ Note for Aimee	0 B	9:46 AM	A. Sanita	📄
<input type="checkbox"/>	☆ doc 2017 tax documents.docx	12 KB	9:44 AM	A. Sanita	

Storage used: 315 MB

Email me when a file is: Uploaded to this folder

Once all documents are loaded you can simply exit the program and we will take it from there.