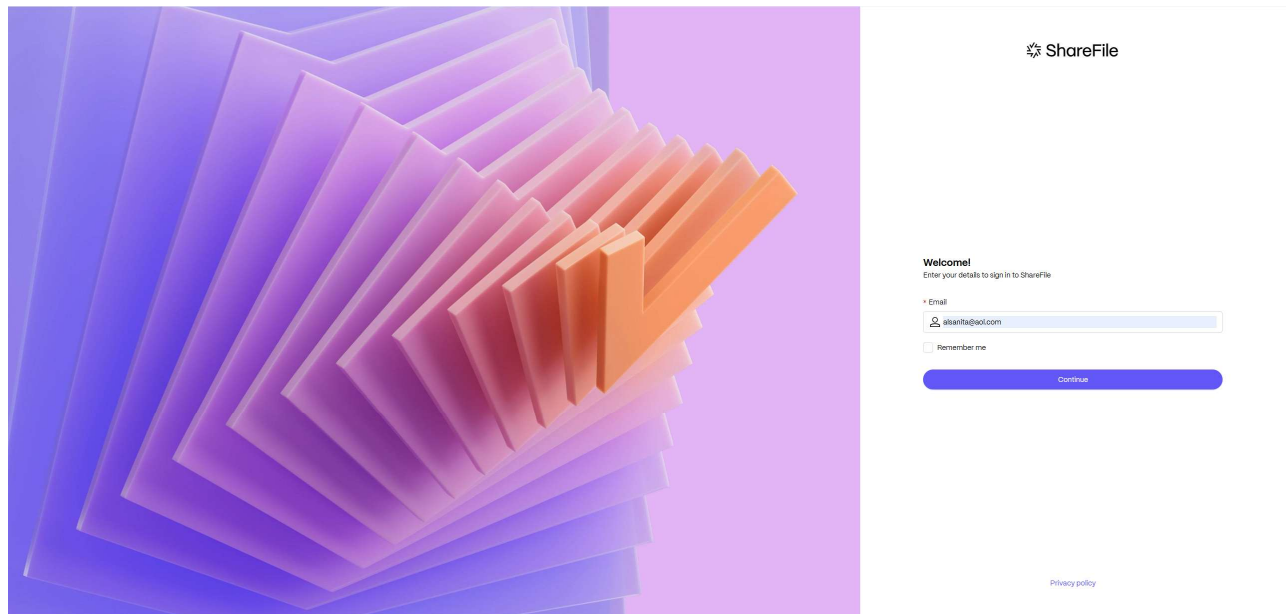


## Sharefile Upload Info

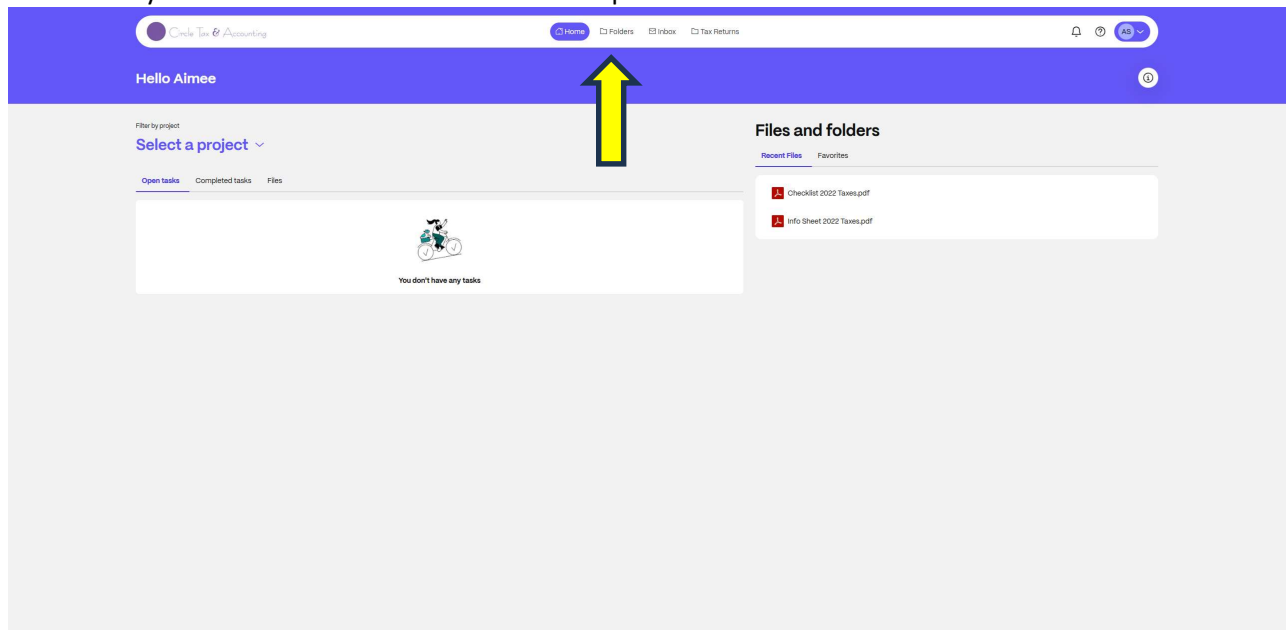
**\*\*Please note Sharefile has made changes to their website so things look a little different but basically work the same as in previous years**

<https://circletax.sharefile.com>

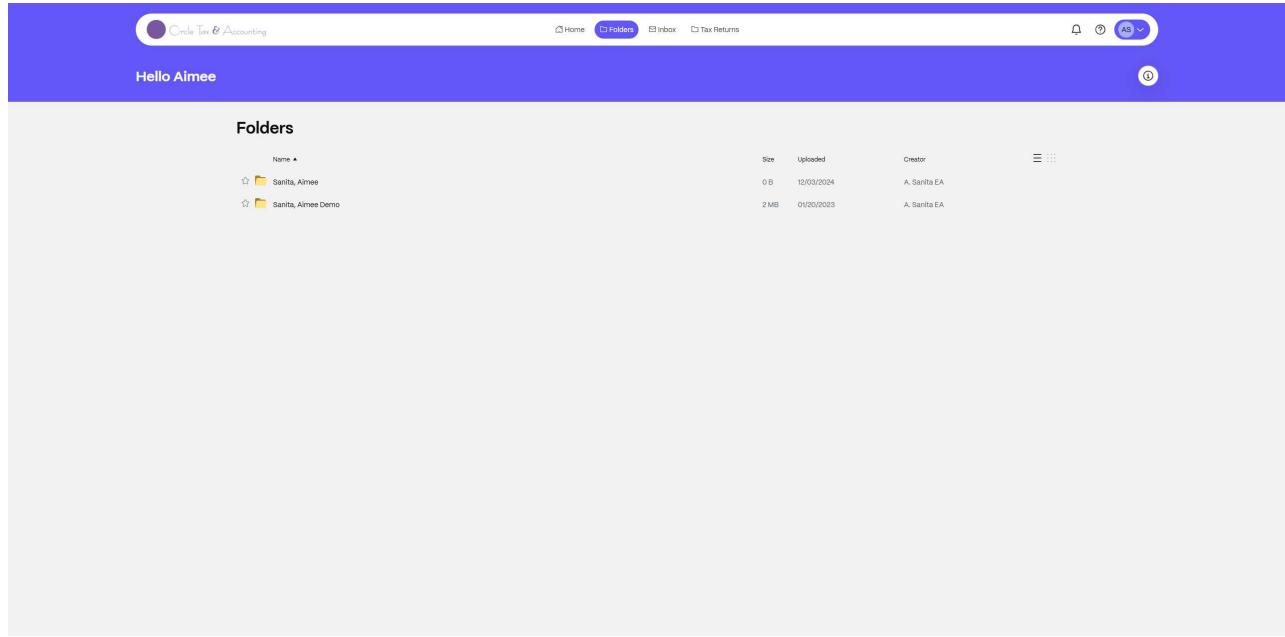
Log into your account with your email and password (you created the password, so if you don't remember it please select forgot password and reset it). This is now on two separate screens. Put in your email address and click continue. Then put in your password. The Forgot Password link is on that screen.



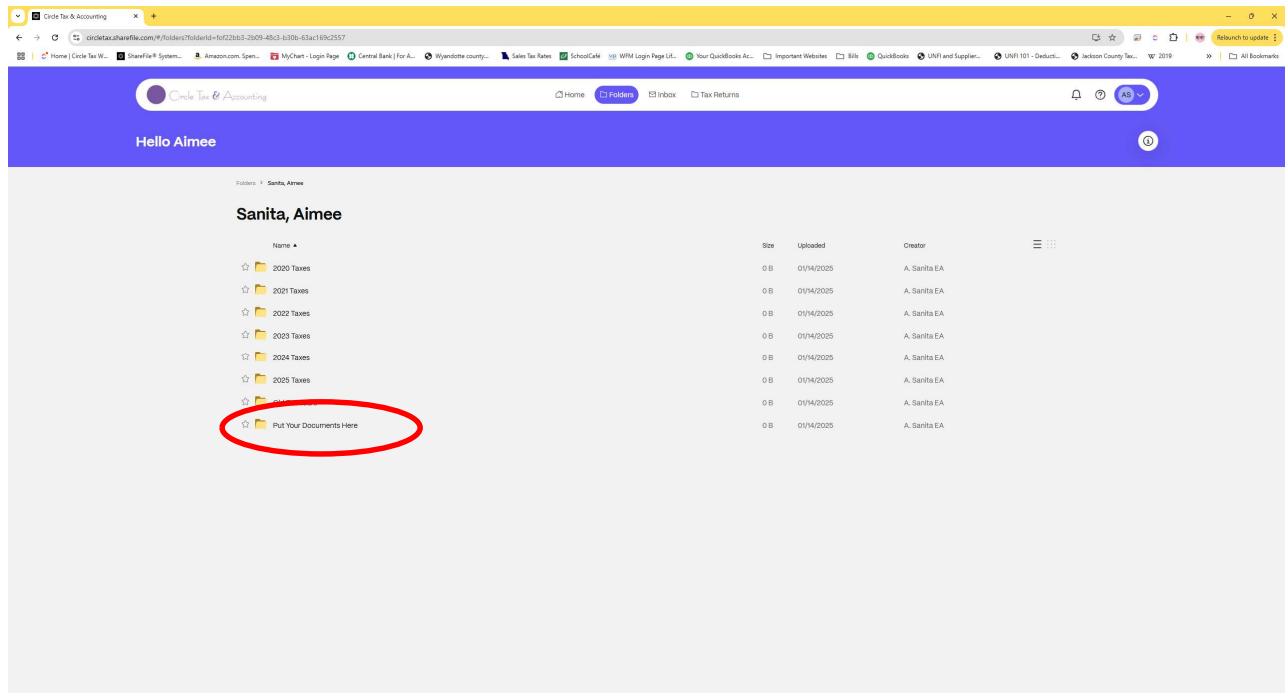
When you first log in there is now a Home page. There will be nothing on this page look at the top of the screen and you'll see a Folders Tab. Click on it to open the folder.



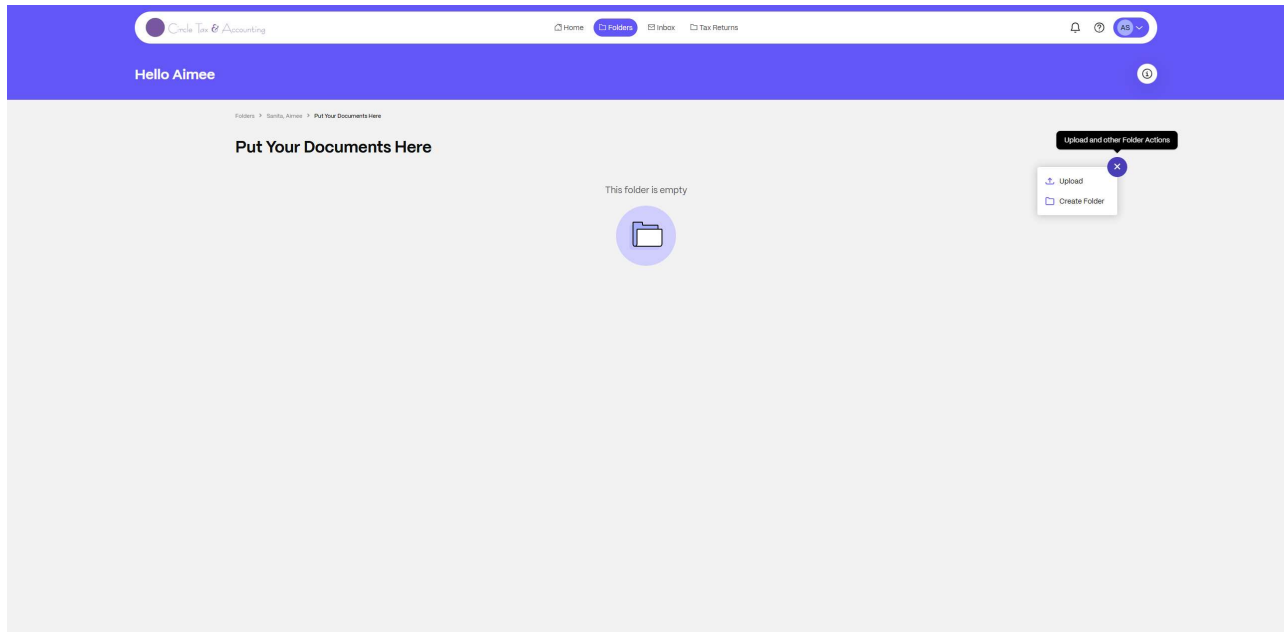
The next screen will have your folders. Most people will only have one folder on this screen with their name. If you have a business or have filed joint/separate over the years you may see multiple folders. Click on the folder you want to load documents into.



If you are loading documents, please click on the Put Your Documents Here folder. That is the only folder you should be able to load documents into.

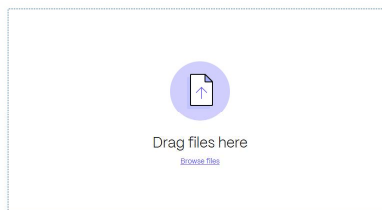


Once in the folder you can upload files. Click on the Blue Circle with the + Sign in the righthand corner and select Upload.



Upload to "Put Your Documents Here"

×

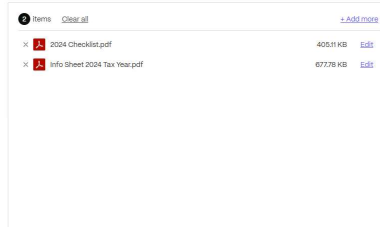


Upload Cancel

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.

Upload to "Put Your Documents Here"

×



**\*\*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 HEIC, pages, or numbers files) please convert the file to either PDF or office file type (word or excel).**

Once you have the documents on the screen click the Upload button at the bottom of the screen.

The documents will show up in the folder now

Circle Tax & Accounting | Home | Folders | Inbox | Tax Returns | Hello Aimee

Put Your Documents Here

Name	Size	Uploaded	Creator
Info Sheet 2024 Tax Year.pdf	678 KB	9:57AM	A. Sanita
2024 Checklist.pdf	405 KB	9:57AM	A. Sanita

To make sure the files actually loaded make sure the file size does not show 0 KB. If it shows 0 then it didn't actually load the file and you will need to try again.

They have taken away the note feature so if you need to provide additional information please feel free to send us an email at [questions@circletax.com](mailto:questions@circletax.com) and we can save it to the file.