

# Citrix ShareFile User Guide

## Citrix ShareFile User Guide

Crowe MacKay is introducing the Citrix Sharefile tool to all clients, replacing the Doc.It Portal. This change is to support our clients transition to digital processes, increase security and protection of personal information, and support our sustainability efforts. This guide will answer commonly asked questions and outline step-by-step the process on how to use the Citrix ShareFile tool.

If you have any questions, please contact your local office by phone or email

Toll Free: 1 (844) 522 7693  
**[contactus@crowemackay.ca](mailto:contactus@crowemackay.ca)**

### What is Citrix ShareFile?

Citrix ShareFile is a cloud based application allowing us to efficiently and securely share documents with you. Using this application provides more security than sending attachments through emails, increasing the protection of client information.

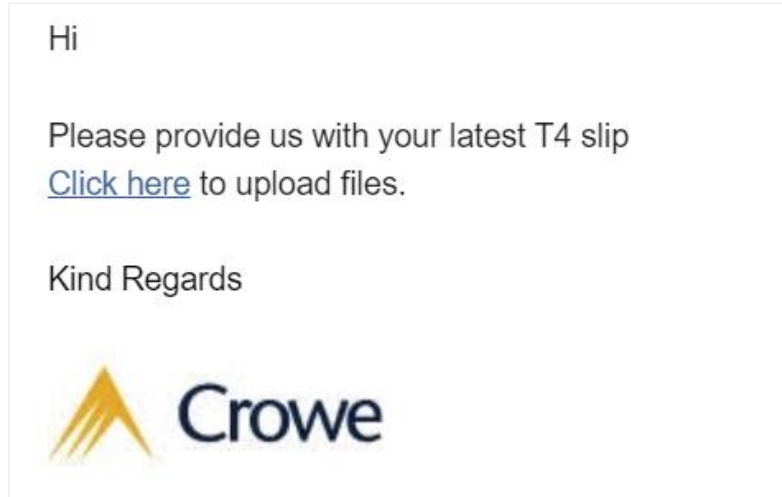
### How will I interact with Citrix Sharefile?

Depending on your engagement, Crowe may create a portal for you to upload and download documents, or they may simply send you links via email for you to download or upload necessary piece of information.

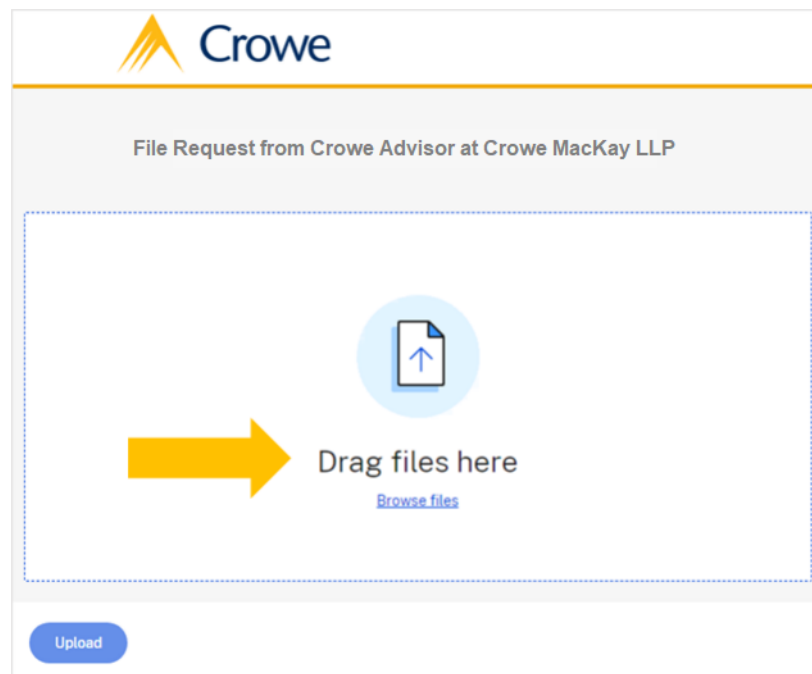
The Citrix ShareFile application is designed to be user friendly and easy to use.

## I received an email with a link to upload documents. How does it work?

You received an email like the image below:

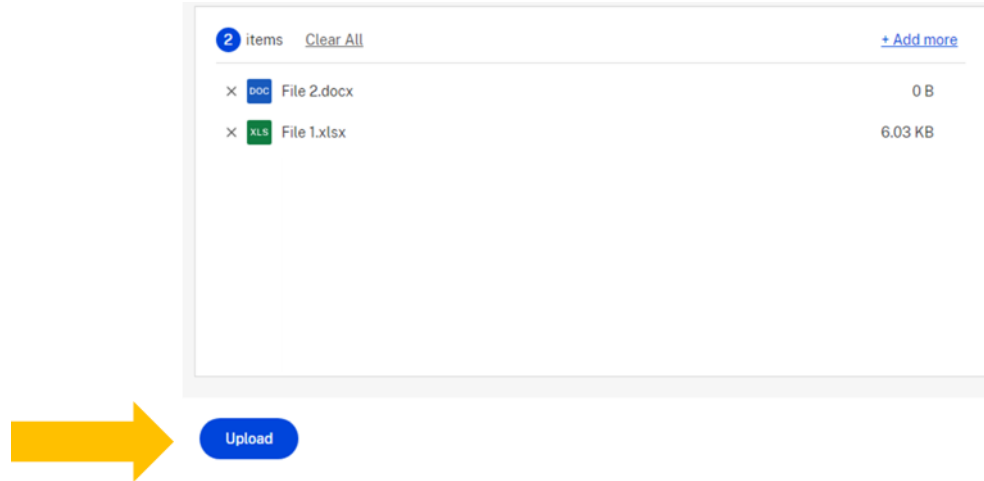


This is a request from us asking you to provide information securely through a weblink. You will need to click the “[Click here](#)” link. This will open a new page in your web browser (this link is also compatible on mobile devices).

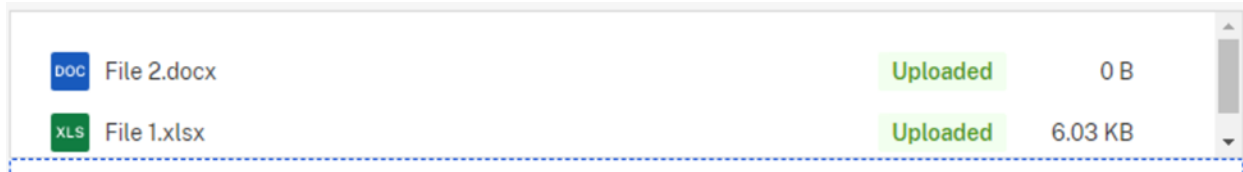


Drag and drop as many files as needed onto the page (or use the “[Browse Files](#)” link to browse your device).

Once you upload all your files, you will see a list of the files you provided.



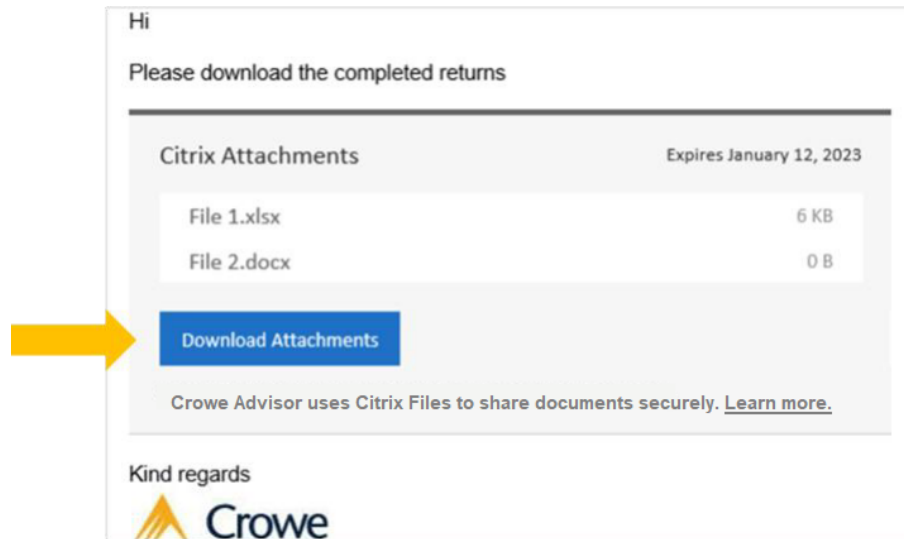
To submit the document(s) click on the “**Upload**” button. You will receive confirmation when the files are successfully uploaded. It is now safe to close the application



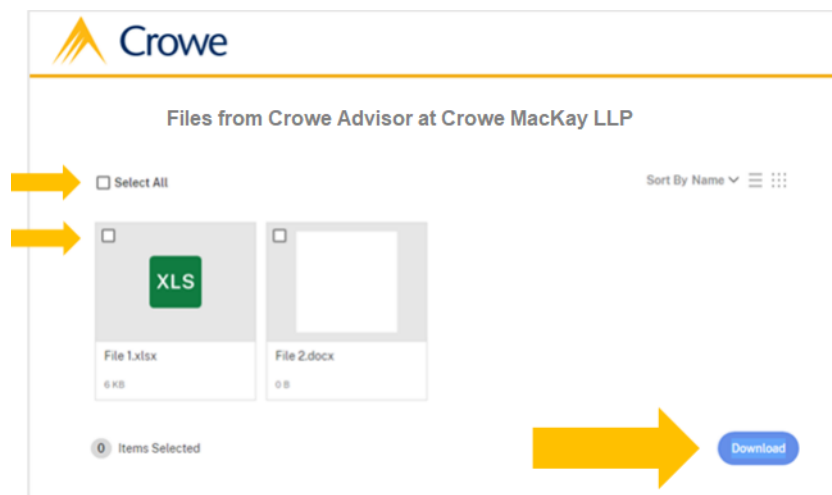
**NOTE:** You can reuse the same link again if you missed uploading a file. The link expires after one week. If you need to send more information, contact your Crowe Advisor and they will send you a new link.

## I received an email with a link to retrieve documents. How does it work?

You received an email like the image below:



This email provides you with a link to securely download documents from our secured environment. Click on the “**Download Attachments**” button to access shared files from your Crowe Advisor. This will open a new page in your web browser.

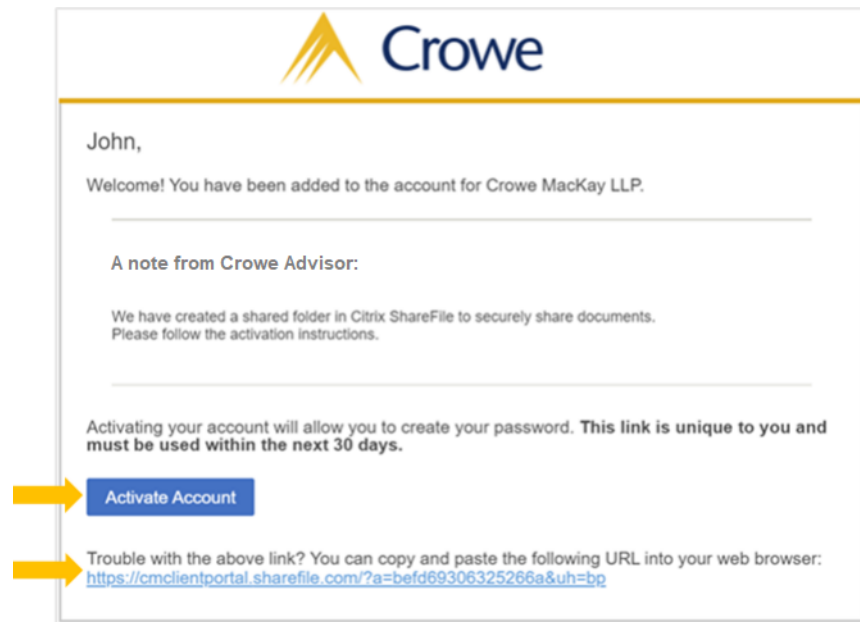


Select the files you want to download by checking the top left boxes or simply by checking the “**Select All**” option. Then click “**Download**” and follow the prompts from your device. If you selected more than one file, they will download as one ZIP file named “**Files.zip**.”

**NOTE:** You can reuse the same link again if you missed uploading a file. The link expires after one week. If you need to send more information, contact your Crowe Advisor and they will send you a new link.

## I received a request to activate a Citrix ShareFile account. What should I do?

When Crowe creates a secure folder to share your documents you will receive a registration email that looks like the following:



You will need to activate your account to use this application. To do so, click on “**Activate Account**” or copy and paste the link provided to your preferred internet browser.

The link will take you to a web page where you will need to provide a valid phone number. Your phone number is required to enable the Multi Factor Authentication security feature of Citrix ShareFile.

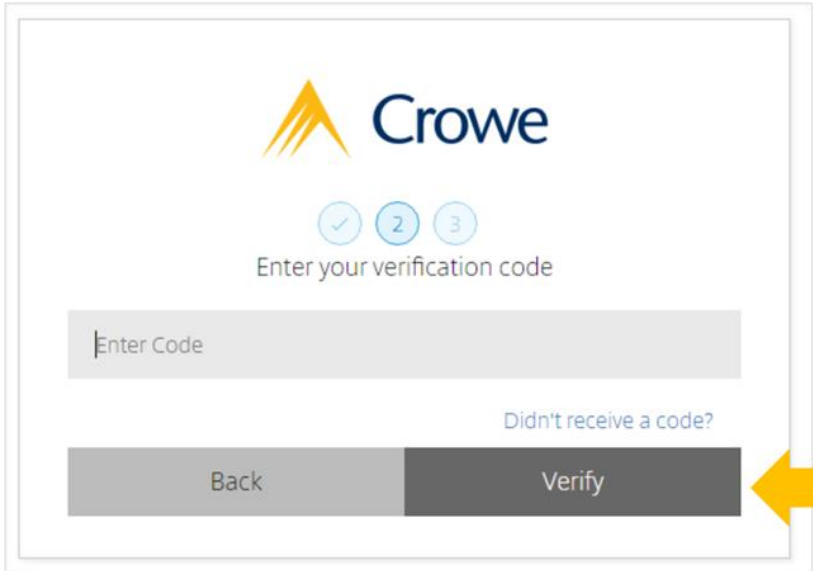
You can either select to receive an SMS or a voice call to receive your authentication code when logging-in to Citrix ShareFile.

Once you have completed the information fields click “**Continue**”



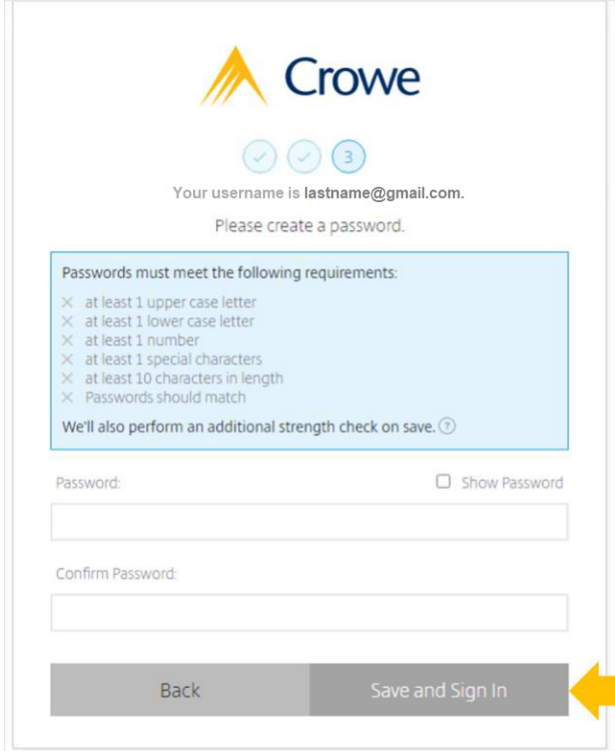
The screenshot shows the Crowe registration form. At the top is the Crowe logo. Below it are three numbered steps: 1, 2, and 3. Step 1 is highlighted with a checkmark. The text reads: "Welcome! Please confirm your personal information." The form fields are: "First Name: \*" with a red asterisk and "\* Required" label, containing the text "John"; "Last Name: \*" with a red asterisk, containing the text "Smith"; "Company:" with an empty text box; "Country: \*" with a dropdown menu showing "Canada"; and "Phone Number: \*" with a red asterisk and a help icon, containing "+1 1231231234". Below the phone number are two radio buttons: "Text (SMS)" (selected) and "Voice Call". At the bottom is a dark grey button labeled "Continue". A yellow arrow points to the "Continue" button.

You will be promoted to enter the verification code you received by SMS or voice call and click “**Verify**”



The screenshot shows the Crowe verification screen. At the top is the Crowe logo. Below it are three numbered steps: 1, 2, and 3. Step 1 is highlighted with a checkmark. The text reads: "Enter your verification code". Below this is a text input field with the placeholder text "Enter Code". To the right of the input field is a link that says "Didn't receive a code?". At the bottom are two buttons: "Back" and "Verify". A yellow arrow points to the "Verify" button.

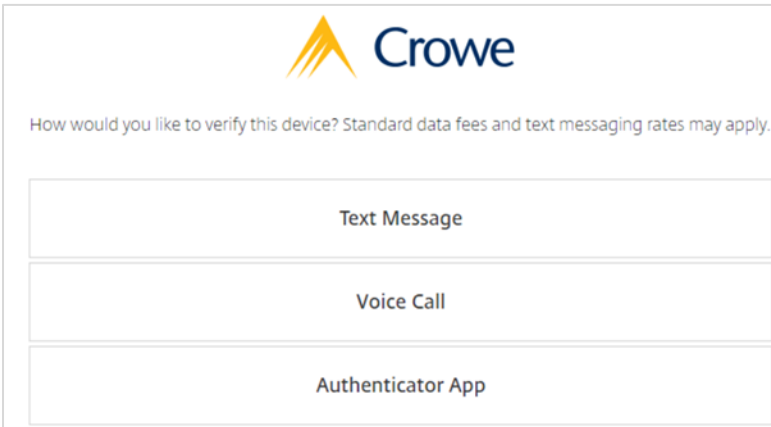
You will then be requested to create a password:



The image shows a password creation interface for Crowe. At the top is the Crowe logo. Below it are three circular progress indicators, with the third one containing the number 3. The text reads: "Your username is lastname@gmail.com. Please create a password." A light blue box contains the following requirements: "Passwords must meet the following requirements: at least 1 upper case letter, at least 1 lower case letter, at least 1 number, at least 1 special characters, at least 10 characters in length, Passwords should match. We'll also perform an additional strength check on save." Below this are two input fields: "Password:" and "Confirm Password:", each with a "Show Password" checkbox. At the bottom are two buttons: "Back" and "Save and Sign In". A yellow arrow points to the "Save and Sign In" button.

Follow the instructions and click **“Save and Sign In”**

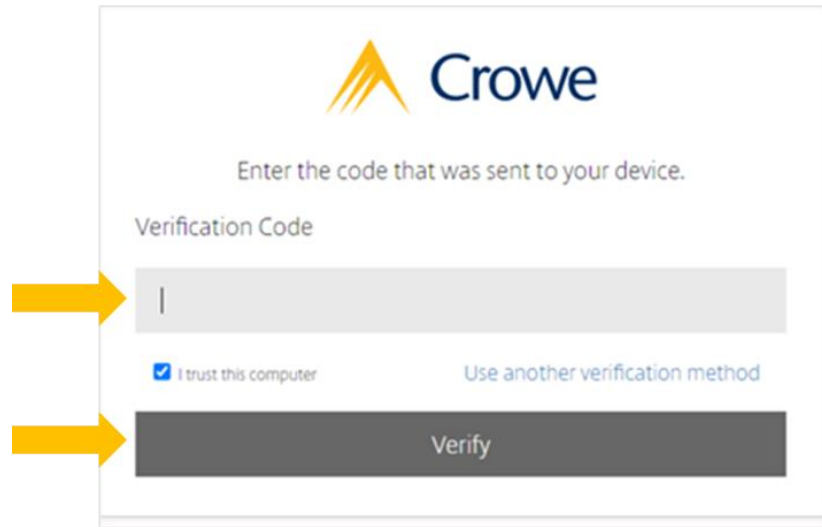
You will be prompted to authenticate the device you are using. This is the standard Multi Factor Authentication process.



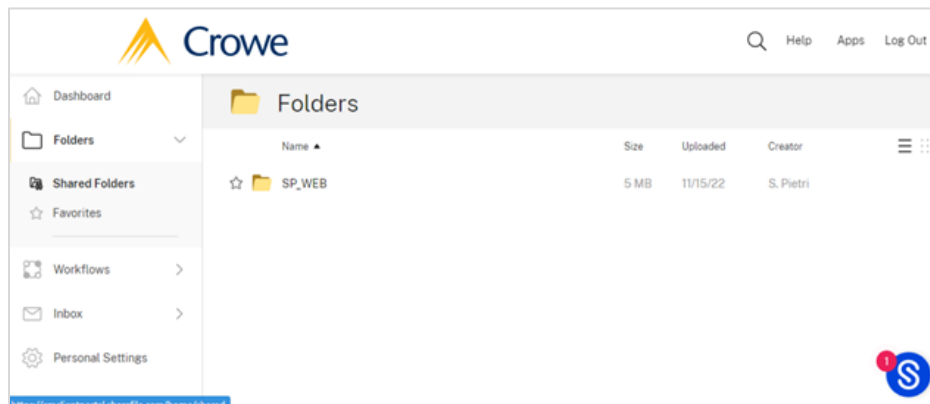
The image shows a device verification screen for Crowe. At the top is the Crowe logo. Below it is the text: "How would you like to verify this device? Standard data fees and text messaging rates may apply." There are three buttons stacked vertically: "Text Message", "Voice Call", and "Authenticator App".



Once a verification type is selected, you will have to enter the received code:



**IMPORTANT:** do NOT check “**I trust this computer**” if it is a computer you share with someone else! Select “**Verify**” and you will be taken to the secure folder.



## I have access to a secure folder. How do I log into it?

If you have completed the ShareFile registration, you can login directly to the secured folder using the link: <https://cmclientportal.sharefile.com/>

Follow the login instructions and you will arrive back to the shared folder(s) page.

## Is there a file size limitation?

The file size limit is 50G. This capacity is more than sufficient for the file sharing you will do with Crowe.