

Getting Started with Our Client Portal

Here are the basics of our Client Portal, to help you get started accessing, downloading and uploading files faster as a Client user

How to log in

1. Go to <https://cpaphilly.sharefile.com/>
2. Enter your username (this is the email address associated with your account.)
3. Enter your password, and click Log In. You will be taken to the Dashboard menu. If you cannot remember your password, click Forgot Password.

Account Dashboard

1. The Dashboard is the first page that you'll see upon signing into your CPA Client Portal account.
2. Menu items and buttons will be displayed depending on your account permissions and abilities as set by the Administrator.
3. Recent Files will display up to 5 files that you previously accessed from the current web browser.
4. Use the navigation menu on the left side of the page to get access folders and settings. If you do not have a page or menu, consult with an account Admin about obtaining permissions.

How to upload files in your account

(You may only upload files to folders where you have been given the Upload permission.)

1. Navigate to the folder where you wish to upload files.
2. Since you are a client user, your folder will be located in the Shared Folders section of the account. (If you do not have folders to access, no folders have been shared with you.)
3. Access the green Action Button and select Upload.
4. Drag your files from your computer into the Drag Files Here area, or click Browse files to select them manually. Click Upload when ready.

How to download files from a Client Portal ShareFile Link

1. Click the link located in the email from the person sending you files. The link may appear as a ShareFile URL or a Download button. (Note - Depending on the original sender's message settings, you may be required to enter your name and email address before you can upload any files.)
2. On the download page, you can download and preview the file (or files). If you were sent a single file, the file will be displayed in the content viewer. Use the green Download button to download the files.
3. When downloading files from ShareFile, the files will be downloaded to your computer.
4. Depending on your browser settings, you may be prompted to select where files should be downloaded to.

How to download files from your Client Portal account

1. Navigate to the folder in your ShareFile account that contains the file you wish to download.
2. To download a single file, right-click the file and select the Download option.
3. To preview the file before downloading it, simply click the file name once to open it in the Content Viewer. From the viewer, click the Download button on the right.
 - Note – You can download multiple files at once by using the checkboxes on the left side of each file name. Select the files then click the Download button that appears in the content menu above the file list.
4. The file(s) will be downloaded to your computer. Depending on your browser settings, you may be prompted to select where files should be downloaded to.