CITRIX®

ShareFile

Getting Started

Send a file in 3 easy steps
Quickly organize and share your files

Getting Started with Citrix ShareFile

Welcome to ShareFile! You can use your ShareFile account to easily and securely exchange files with anyone, anywhere online. Some of the features of your ShareFile account may differ depending on your settings, but we've collected tips for the most popular features and tasks to help you get started.

If you need any help with your account, our customer service team is here for you. Unlimited support is free for all ShareFile users.

Send a file in 3 easy steps

ShareFile can help you send any file up to 10 GB. Instead of sending a regular attachment, ShareFile allows you to upload files to your account and send links that allow recipients to download files.
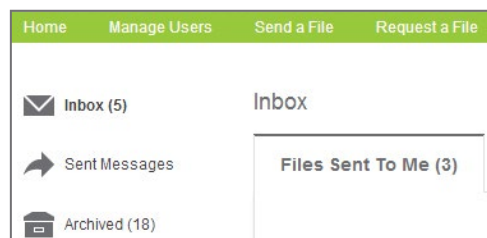
1   Log in to your account and click the **Send a File** link in the top navigation bar.

2   A Send form will open. Enter the email address of the person you want to send files to, a subject and a message. Below the message, you will be able to determine how the link to your file will work and how many downloads are allowed. When you have selected these settings, click **Next Step**.

3   You can select a file to upload by clicking the **Choose Files** button to view the files on your computer. Once you have selected your file, click the **Upload Files** button. This will begin the file transfer. As soon as the upload completes, your email will be sent to the recipient with a link to the file you selected.

You can review emails you have sent from ShareFile in your Inbox. Click **Inbox** in the sidebar menu of the Home screen, and then click **Sent Messages** to see a list of your sent emails and to edit link expiration dates or notification settings.

Organize files with quick folder setup

You can set up folders to store files on your ShareFile account. Folders allow you to share data within the account.

1   Log in to your account and click the **Create Folder** button on the Home
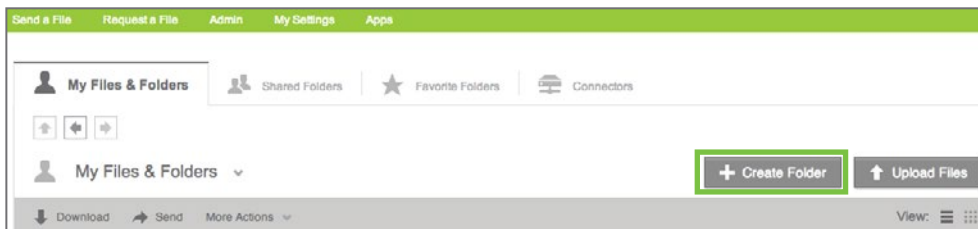
2   On the Create Folder screen that opens, give your folder a title.

3   Optionally, you may also enter a description for the folder, which will be displayed as a note attached to this folder in your account.

4   You can share this folder with other users on your ShareFile account via the Add Users dropdown menu. You can also grant other users access to the folder after it is created (see **Share Your Folders**).
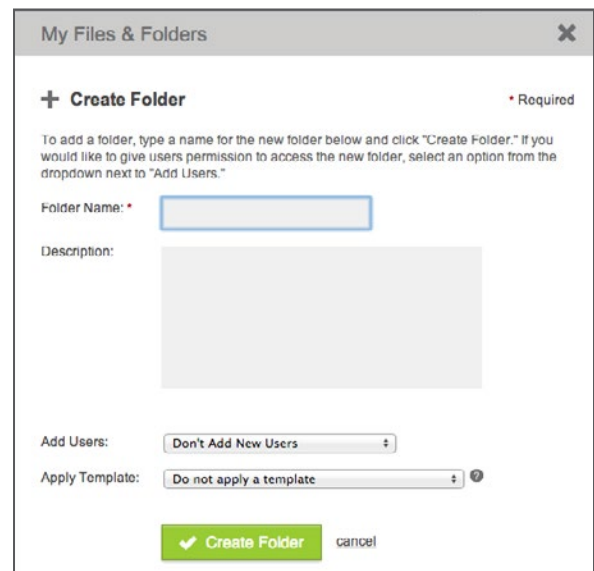
5   Click **Create Folder**. Your new folder will be created instantly so you can begin adding files.

In the Folders tab, click the star to the left of a folder to display it under your Favorite Folders tab. By marking only the folders you use most as favorites, you can find and access these folders faster.

Share your folders

In addition to sending files, you can also share folders on your ShareFile account to easily exchange files with other users. There are two primary ways to share your folders.

Sharing files with a brand-new user

If you want to share information with someone who doesn't have a user name and password for your account, you can set them up as a new user on the account.

1 Log in to your account and click **Manage Users** in the top navigation bar. From the Manage Users page, click **Create New Client** if you will be adding a new user outside of your company. Click **Create New Employee** if the new user is a coworker.

2 Enter the email address of the new user. This will be their ShareFile user name. Click **Next Step**.

3 On the next screen, enter the new user's first and last name. You can also enter their company name. Use the check boxes in this section to determine what features and tools this user may access on the account. When you have everything configured, click **Next Step**.

Steps continue on next page

4 You will be able to see a list of the folders you have created on your ShareFile account. Mark any folders that you would like to share with this user, and place a check in the box for any permissions that you would like to grant the user for these folders. When you have set the user's folder permissions, click **Add User to Folders and Groups**.
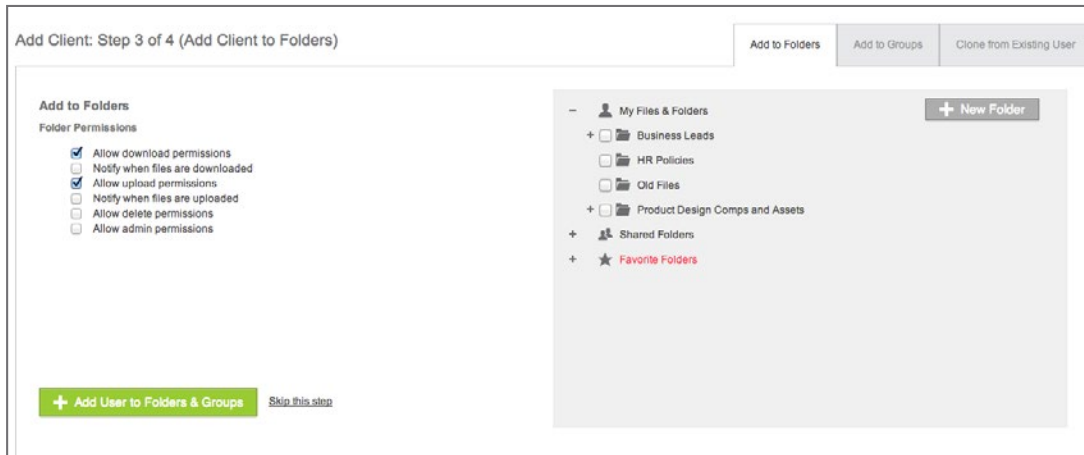

5 You will be able to preview a welcome email containing the new user's login information and a brief introduction to your ShareFile account. You can edit the text of this message and click **Send Email** to let the user know you have granted them access to your ShareFile account.

Sharing files with existing users

Once you have granted a user access to your account, you can share folders with them in a few simple steps through the Folder Access list.

1   Open a folder you would like to share with an existing user on your ShareFile account. At the bottom of the screen, you will be able to see a Folder Access list. This section shows all users with access to this folder.

2   Click **Edit** in the Folder Access section. This will open a new screen where you may edit the permissions for the users on the folder. Hover over the **Add Users** dropdown menu, and choose how you would like to add a new person to the access list. If you have the user you would like to add saved in your ShareFile address books, you may select to add the user from the address book. Otherwise, click **Add Manually**.
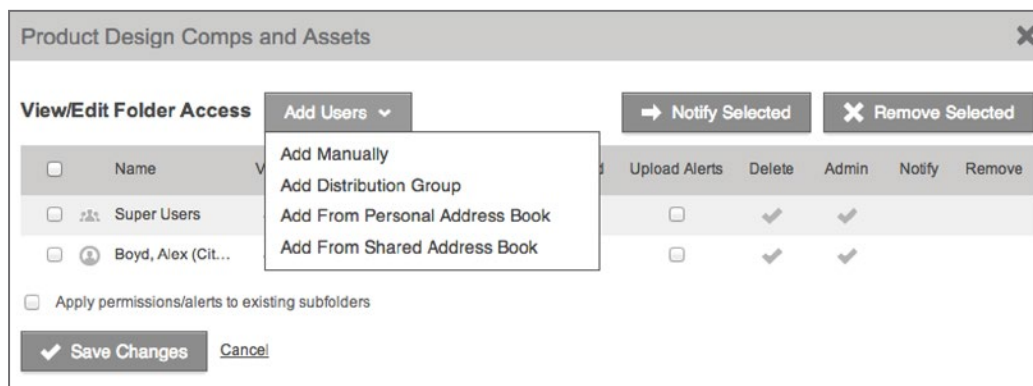
3   If you chose to add a user from your personal or shared address books within ShareFile, you will be able to select the user on the next screen and click **Add Selected Users**.

Steps continue on next page

4 On the next screen, you will be able to set the permissions that the user will have on your folder. If you chose to add the user to the folder manually, you will also need to enter their email address and name on this screen. Mark the check boxes for the permissions that you would like to grant this user. When you are done, click **Add Users**.

5 You will return to the screen to edit folder access permissions. Check that the user you added has the correct permissions, and click **Save Changes**.

World-class customer support

Your ShareFile account has a wealth of features and tools designed to make sharing files as easy and as secure as possible. ShareFile support representatives and account managers are available to help with any questions.

The Help section of your ShareFile account has everything you need to contact the ShareFile support team and your ShareFile account manager. Log in to your account and click the **Help** link in the top navigation bar to find links to training videos and the ShareFile knowledge base, tools for contacting ShareFile support via chat or email, and the phone number and email address of your dedicated account manager.

We're here to help

ShareFile support is dedicated to raising the bar for service in the tech industry, and unlimited support is free for all ShareFile users.

1-800-441-3453

+1-919-745-6111 internationally

support@sharefile.com

Thank you for choosing ShareFile!

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ShareFile allows you to securely share, sync and store large files from anywhere. ShareFile was launched in November 2005. In the years following its initial release, ShareFile grew to over 40,000 paying corporate customers and 12 million business users spread across more than 100 countries around the world.

In October 2011, Citrix announced its acquisition of ShareFile. Citrix (NASDAQ:CTXS) transforms how businesses and IT work and people collaborate in the cloud era. With market-leading cloud, collaboration, networking and virtualization technologies, Citrix powers mobile workstyles and cloud services, making complex enterprise IT simpler and more accessible for 260,000 organizations. Citrix products touch 75 percent of Internet users each day and it partners with more than 10,000 companies in 100 countries. Annual revenue in 2011 was $2.21 billion.