Introduction to ShareFile

At Green Accountancy we use a system called ShareFile to securely send and store your documents, ready for you to access from anywhere at any time. Here are some points and tips for using the system:

Logging in

When you joined us, you would have been set up with a folder on ShareFile and sent a welcome email which enabled you to log in and setup your password.

Please note we do not know and cannot access your password information so it is important to keep this safe.

In the event you do forget your password, there is a "Forgot password?" link under the log in boxes. We frequently find that the email from this link goes to spam folders so please check those folders just in case.

If the password recovery does not work for any reason, please let us know and we can reset your account to a basic password to allow you access, then you can change your password again by going to My Settings > Change Password.

Accessing your files

Once you have logged in, you will see all of the folders which you have access too. These should include your personal or company folders as well as Green Accountancy General Documents, where you can find useful information and factsheets.

Most documents can be previewed in your web browser by clicking the magnifying glass symbol to the left of the file name. **Please note you cannot edit any files in ShareFile itself unless you have an Office 365 subscription, otherwise you must download the file, make your changes and then re-upload the file.**

Users

Folders can have multiple users that can access them, either the complete folder hierarchy or specific folders only. For example if you would like a user to access the payroll folder but not the year end accounts, we can give specific folder access.

Please let us know if you need any specific users set up.

Downloading

You can download any file, folder, or combination of, by selecting the files or folders you want with the tick boxes to the left of the file/folder name and clicking download on the grey ribbon just above the files list. If you select a folder or multiple files, they will be downloaded as a zip file which you can extract onto your computer once downloaded.

Uploading

If you need to upload some information to us, or you have downloaded and completed an information request for payroll or an accounts questionnaire, you simply need to navigate to the folder where you wish to upload it (or create a new folder by clicking the grey button at the top right side of the file browser). Then click the Upload Files button at the top right of the browser screen. You will then be taken to the files upload page where you can browse to the files location on your computer or simply drag and drop the files into the box on the upload page. Once all your files are added, click upload. We will receive an email telling us every time you upload something so you do not even need to let us know.

Green Accountancy
Supporting Sustainable Business, Social Enterprise and Charities