


## CLIENT INSTRUCTIONS FOR UPLOADING AND DOWNLOADING PERSONAL/BUSINESS TAX INFORMATION

Instruction for uploading and downloading your file(s) from your **Electronic Mailbox** (Sullivan & Company Secure Portal) are as follows:

1. Log-in using the following internet address:  
<https://esullivanportal.sharefile.com/Authentication/Login>
2. Enter your username (**username is always your email address**) and password you used to activate your account. This will be your permanent password.
3. If you forgot your password select "**Forgot Password**" at the login screen and follow the steps to create a new password.
4. Once logged in, the main page you see will be your "**Dashboard**".
5. To access folders, click "**Folders**"-> "**Shared Folders**".
6. You should now see the main folder(s) you have access to. In order to view documents, you will need to click on the corresponding folder to open it. Click on document(s) needed and select download and/or print.
7. To upload a document, you need to be in a folder and/or create a folder for your documents. Once in a folder you will see a  on the top right hand side. Once you select it, a drop down will appear with option(s) to upload, create a folder, etc. (**wait for screen to show upload is complete, closing out of the screen before this will stop the upload process**).
8. Once you have completed downloading and/or uploading your documents, you can select the "**Log Out**" option in the upper right corner.