



ShareFile Instruction Manual

How to download file(s) to your computer:

1. Odlum Brown uses ShareFile to send any document(s) that contains personally identifiable client information. If you have NEVER downloaded a document using ShareFile with Odlum Brown before, you will receive two emails. One of the emails will contain the subject “**ShareFile Login Information**”. This email should be read **FIRST**.

	<input type="checkbox"/> ☆ Edward Ma	ShareFile Login Information - Edward Ma has sent you files using ShareFile. You will receive another email shortly \	7:09 pm
	<input type="checkbox"/> ☆ Edward Ma	Sensitive Files - Attachments from Odlum Brown Limited Expires May 22, 2017 Test1.docx 12.3 KB Test2.xlsx 8.5 KI	7:09 pm

An activation link is included in this email. You will need to click on the “Click here to activate your user account” link.



The default Internet browser (e.g. Edge, FireFox, Safari, etc.) on your computer will launch. You will be asked to enter your First Name and Last Name (required fields). Once this is completed, click “Continue.” The next window will ask you to create a password. Please note the password requirements above the fields, as all requirements must be met before you can continue. When ready, click on “Save and Sign in.”

ShareFile Client Instruction Manual – June 2017

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Welcome! Please confirm your personal information.

1 2

First Name: * * Required

Last Name: *

Company:

Continue

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1 2

Your username is **obittesting@gmail.com**.

Please create a password.

Please create a password that meets the following requirements:

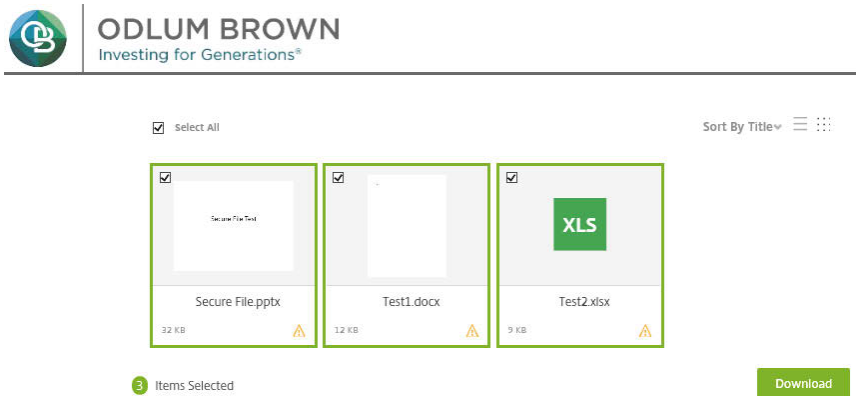
- ✓ at least 1 Upper Case letter
- ✓ at least 1 Lower Case letter
- ✓ at least 1 number
- ✓ at least 8 characters in length
- ✓ Password and Confirm Password should match

Password: Show Password

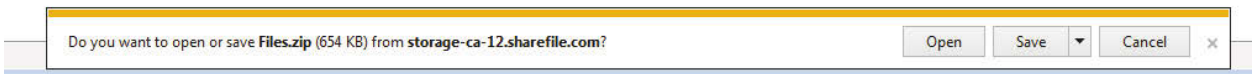
Confirm Password:

Back Save and Sign In

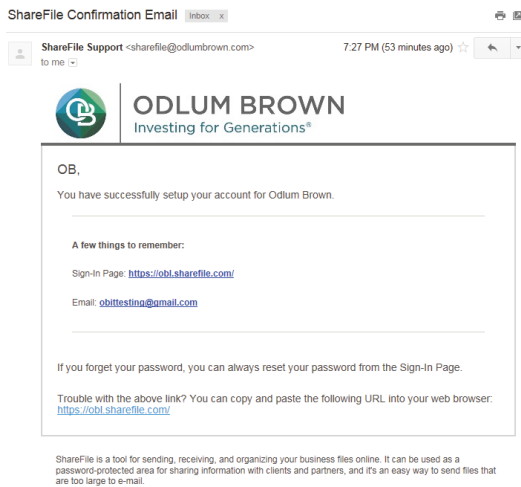
2. A new window will appear for you to download the secure content. You can click on the “Download” button to start the download of all the files at once, or click on each file individually.



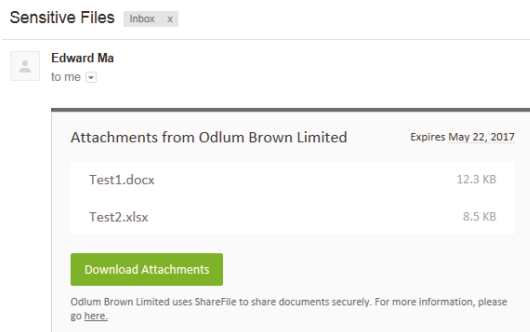
3. Please note that if multiple files are downloaded at once, the files will be combined into a compressed zip file.



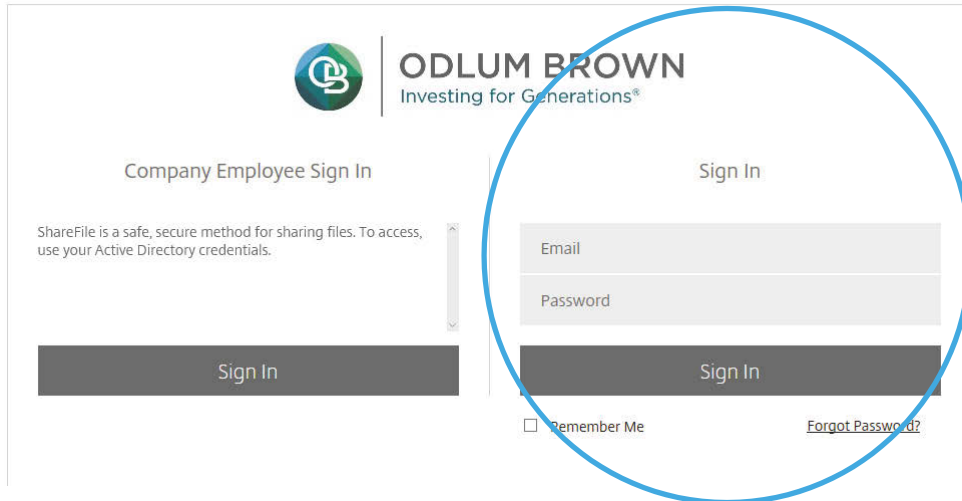
- Once the file(s) are downloaded, an email notification will be sent to the Odlum Brown sender to confirm that the files have been downloaded.
- You will also receive a confirmation email to confirm your account has been set up. Please note the email field below, as this is your login name for the Odlum Brown ShareFile environment going forward.



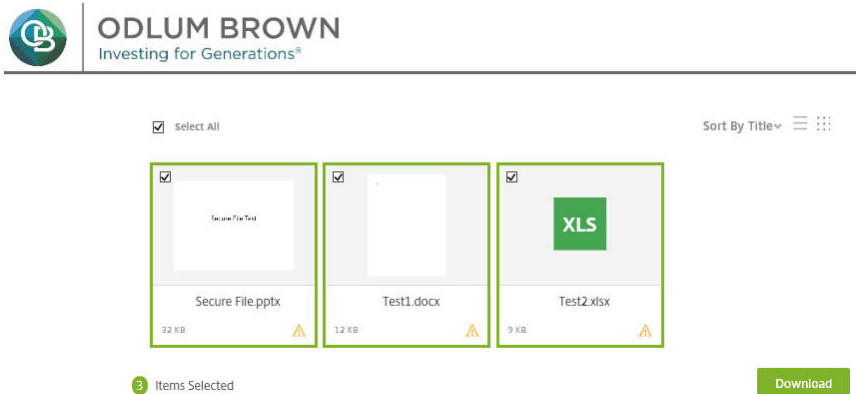
- If you need to download the file(s) again, you will need the email that was originally sent from Odlum Brown (in this example, with the subject line “Sensitive Files”). Click on the “Download Attachments” link to begin the process.



7. After clicking on the link, the default Internet browser on your computer will launch. You will be taken to a login page. To access the files, enter your unique credentials (see step five above for the login ID).



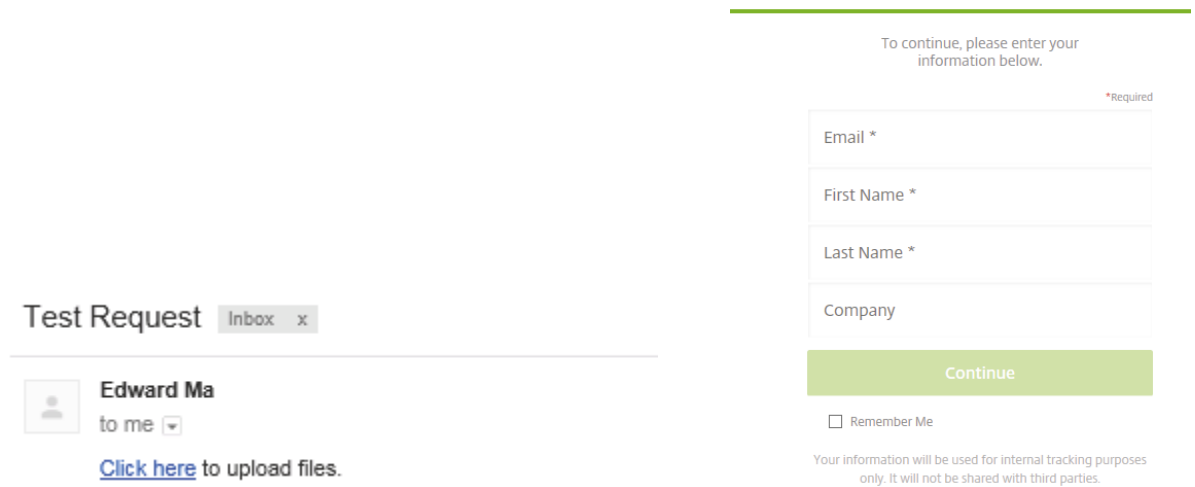
8. Once logged in successfully, you can download the file(s) again.



9. The links will be valid for seven days, and the maximum number of downloads is 10.

How to upload files to Odlum Brown when you receive a Request File email from Odlum Brown:

1. Odlum Brown uses ShareFile to request any document(s) that contain personally identifiable client information. When you receive an email from Odlum Brown and click on the “Click Here” link, you will be taken to a ShareFile site. Regardless of whether you have used Odlum Brown’s ShareFile before or not, you will need to enter the requested information, and then click “Continue.”



To continue, please enter your information below.

*Required

Email *

First Name *

Last Name *

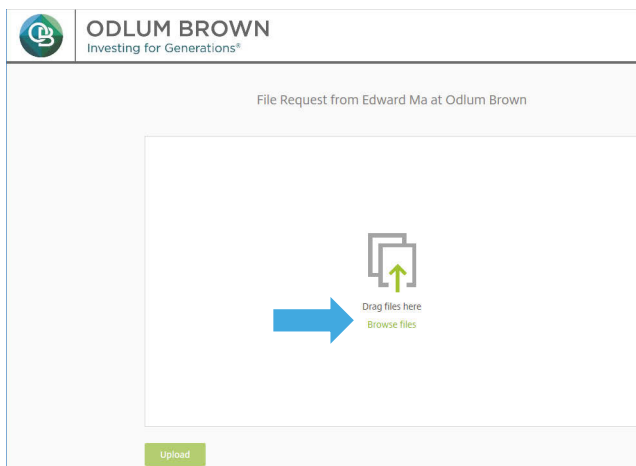
Company

Continue

Remember Me

Your information will be used for internal tracking purposes only. It will not be shared with third parties.

2. You can now add files by either dragging them into the area as directed, or by clicking on the “Browse Files” link to attach files.



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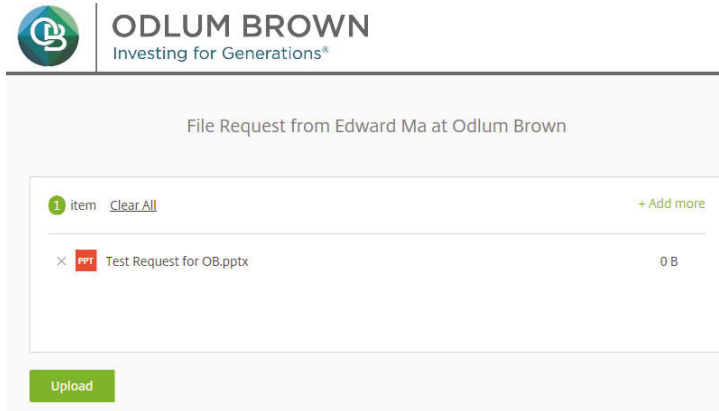
File Request from Edward Ma at Odlum Brown

Drag files here

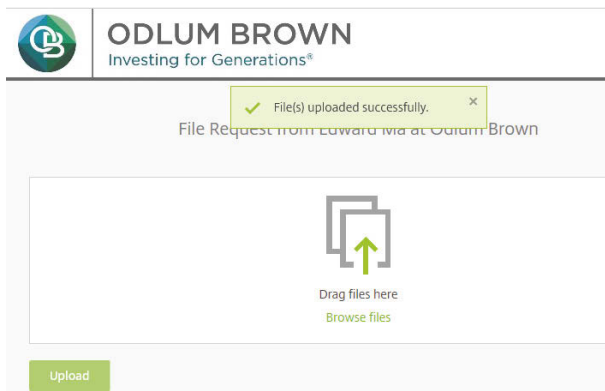
Browse files

Upload

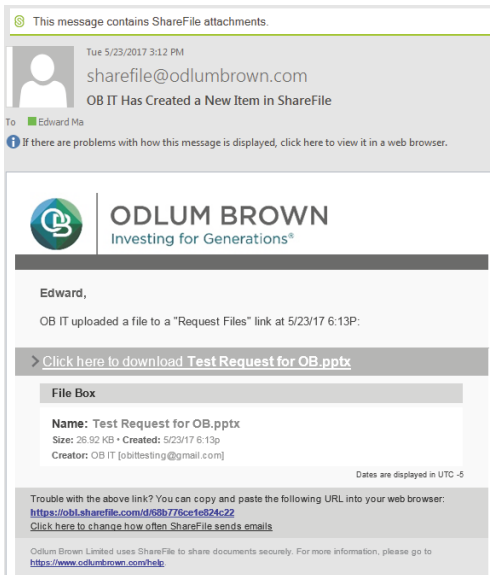
3. You can add more files by clicking on “+Add More” if required. You will then click “Upload” to complete the file transfer.



4. Upon the successful file transfer, you should see the following window.



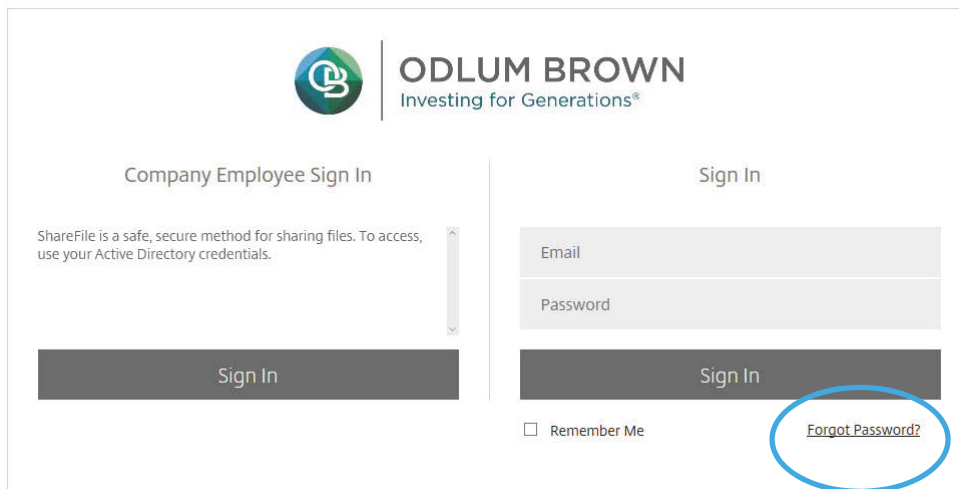
5. An email will be sent to the sender (Odlum Brown) that the file(s) has been uploaded and is ready to download.



How to Reset a ShareFile login password:

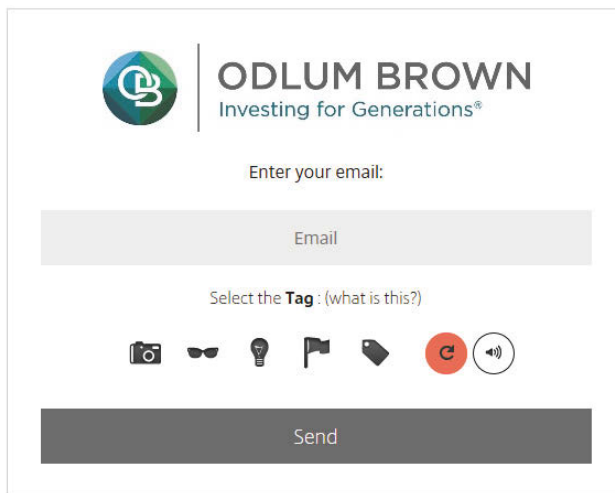
On occasion, you may need to reset the ShareFile login password. You can submit a request to ShareFile to reset your password.

1. You will receive a download link from Odlum Brown. Upon trying to download the content, the authentication page will appear.



2. You can click on the “Forgot Password?” link to initiate the password reset process.

3. The following page will appear:

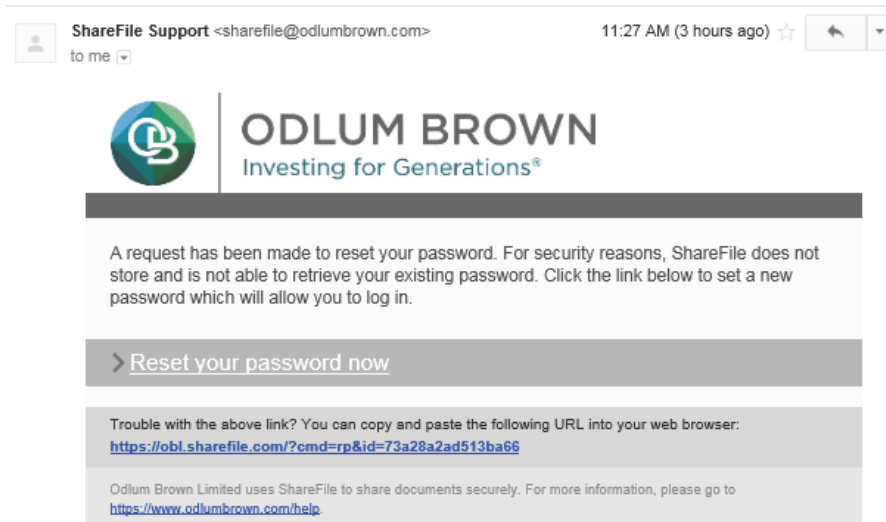


The screenshot shows the Odium Brown password reset form. At the top left is the Odium Brown logo, a green circle with a white 'B' and 'O' intertwined. To the right of the logo is the text 'ODLUM BROWN' in a bold, sans-serif font, with 'Investing for Generations®' in a smaller font below it. Below the logo and text is the instruction 'Enter your email:'. Underneath this is a light gray rectangular input field with the placeholder text 'Email'. Below the input field is the instruction 'Select the Tag : (what is this?)'. Underneath this instruction is a row of seven icons: a camera, sunglasses, a lightbulb, a flag, a tag, a red circle with a white 'C', and a speaker icon. At the bottom of the form is a dark gray rectangular button with the text 'Send' in white.

4. You will need to fill in the email address in the field that Odium Brown sent the original file to, followed by answering a skill testing question. Once successful, an email will be sent to your specified email address.



5. You will receive an email directing you to click on the “Reset your password now” link to reset your password.



6. Once completed, return to the original link in the previous Odlum Brown ShareFile email and enter the user name and password that you have reset from step four. Once logged in, you can now open the content.

If you need any assistance or have any questions, please contact your Investment Advisor.