



## Client Portal

- Immediate 24-hour access to secure electronic document storage
  - Save/upload files to your private folder for WHS
  - View/download files WHS sends to you

If you do not have a client portal account and would like one, please email Amanda at [ACopenhaver@whstax.com](mailto:ACopenhaver@whstax.com)

### How to log into ShareFile Client Portal

You will need to accept the email invitation first and create a password

- Go to [www.whstax.com](http://www.whstax.com)
- Click **Client Portal Login** on the bar across the top of the website
  - o Enter your log in credentials, click Sign In
- Click **Folders** on the left side navigation bar
  - o Click **Shared Folders**

### How to Save/upload files to your client portal

- Log into ShareFile Client Portal
- Click **Folders** on the left side navigation bar
  - o Click **Shared Folders**
- Find the correct folder to save/upload the information to
  - o Drag and drop the file into the correct folder
    - Find the document on your computer, click and hold, drag to the Client Portal screen and drop (let go of your click)
  - o Or click Browse to find file
- WHS will be notified there was a document added to your client portal

### How to View/download/save

- Log into ShareFile Client Portal
  - o Or click the link in the email you received for the upload notification. This will bring you directly to the document that was uploaded.
- Click **Folders** on the left side navigation bar
  - o Click **Shared Folders**
- Find the folder where the document was saved
- Double click the file to open the document
  - o You can print or download the document to save to your computer

**Direct link** to Client Portal Log in Screen: [whstax.sharefile.com](http://whstax.sharefile.com)