

Citrix - ShareFile Portal & RightSignature

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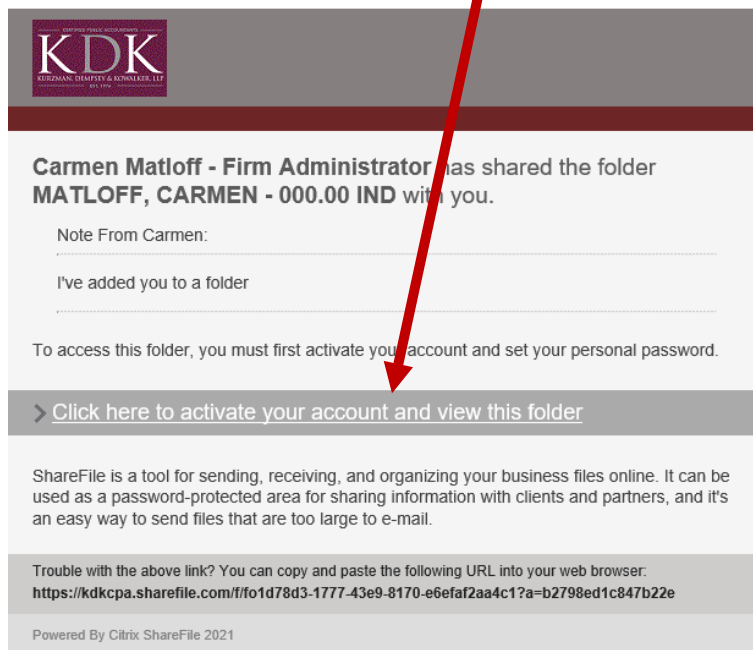
Getting started with ShareFile

Kurzman, Dempsey & Kowalker, LLP has upgraded our Portal and E-Signature to **Citrix ShareFile & RightSignature**. If you have any questions feel free to contact Carmen Matloff, Firm Administrator via e-mail cmatloff@kdk-cpa.com or via phone **781-828-9420**.

Below are several basics of ShareFile to help you get started accessing, downloading, and uploading files faster as a Client user.


Getting Started:

1. You will receive an e-mail from Carmen Matloff, Firm Administrator stating, "Carmen has shared a folder with you". This is your new portal, when you open the e-mail you will see our firm log with a link, click on the link (see below).



Note: This is a **one-time function**, after you set your password you can log into your portal at any time.

2. The link will bring you to confirm your name (see below), **click continue.**



1 2

Welcome! Please confirm your personal information.

First Name : * * Required

Carmen

Last Name: *

Matloff

Company :

Continue

3. Now you can enter your password and **click Save & Sign in.**

Password requirements:

By default, all passwords must contain:

- Must contain a minimum of 8 characters
- Must contain 1 upper case and 1 lower case letter
- Must contain at least 1 number(s)
- Must contain at least 1 of these special characters below:

! " # \$ % ^ & * () - _ + = / . ? \ [] | ` ~ @ '

KDK
KANSAS CITY, MISSOURI & KANSAS CITY, ILL.
EST. 1952

✓ 2

Your username is missea1@msn.com.

Please create a password.

Passwords must meet the following requirements:

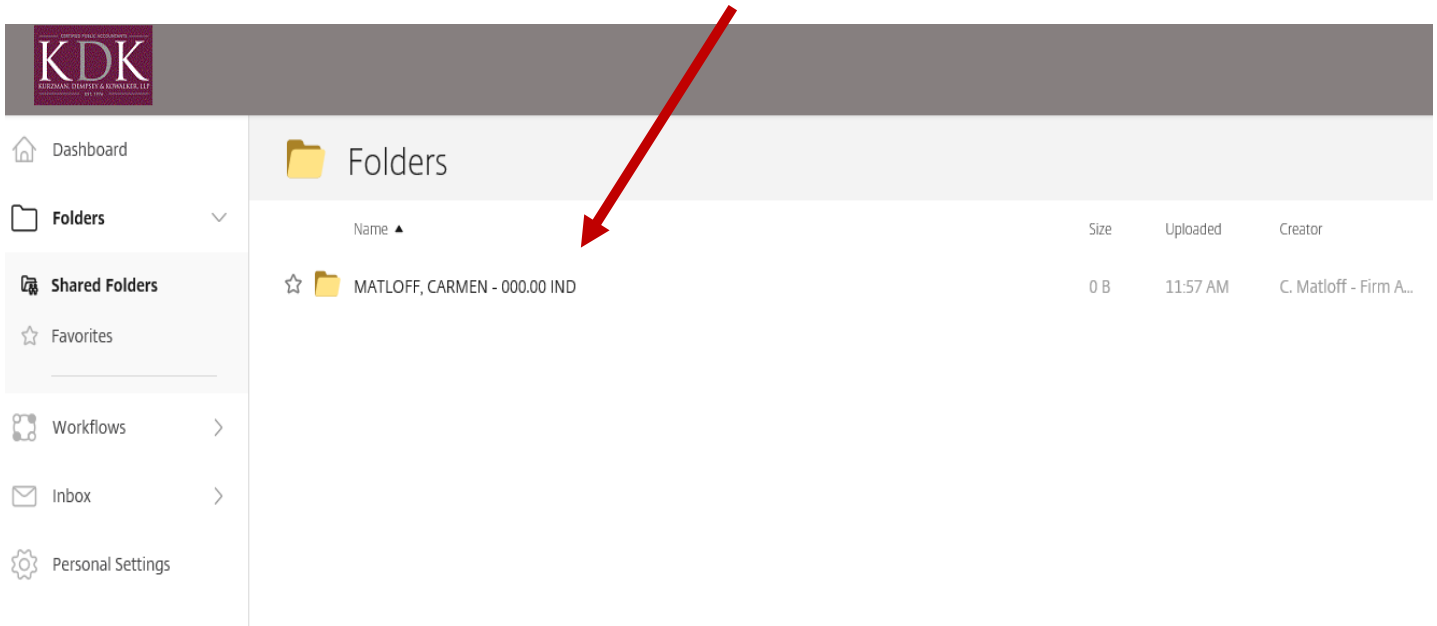
- ✗ at least 1 upper case letter
- ✗ at least 1 lower case letter
- ✗ at least 1 number
- ✗ at least 1 special characters
- ✗ at least 8 characters in length
- ✗ Passwords should match

We'll also perform an additional strength check on save. ?

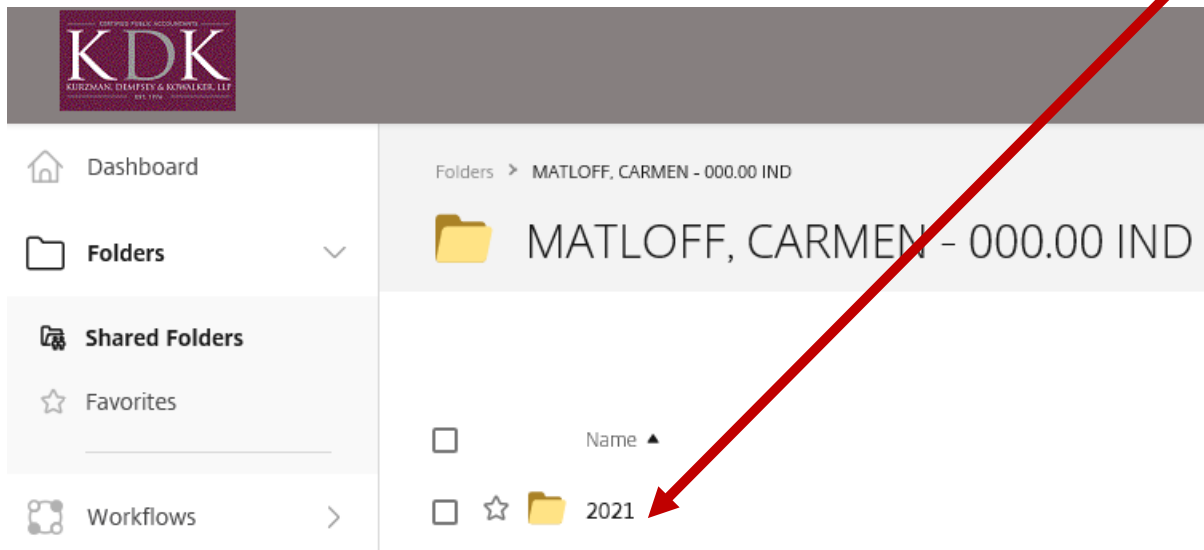
Password: ☐ Show Password

Confirm Password:

4. You are now in your portal (see below).

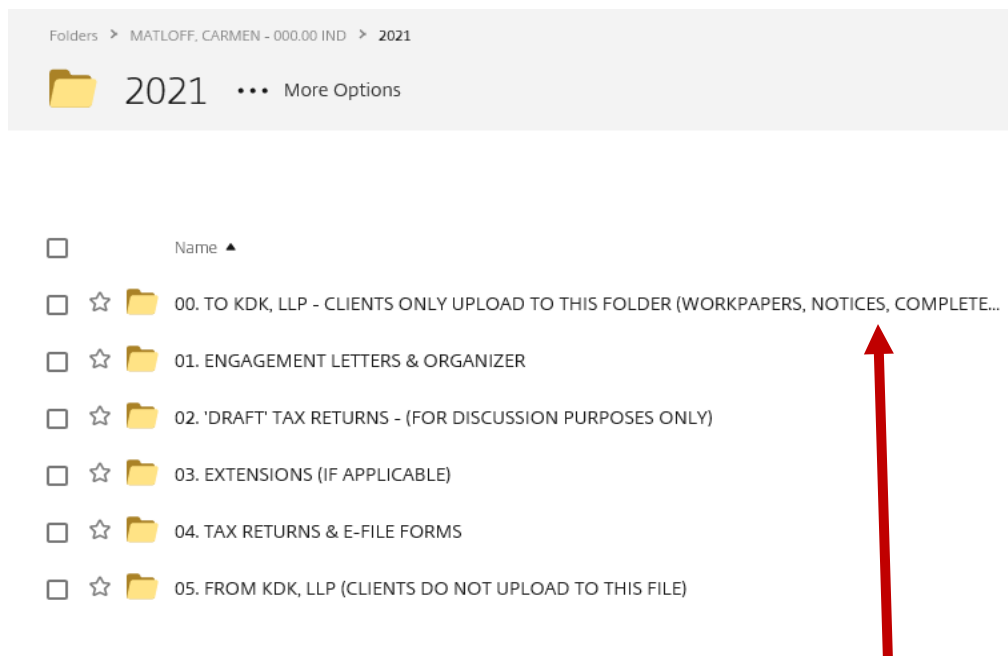


5. Click on the folder with your name, you will see folders by years, **2021**.

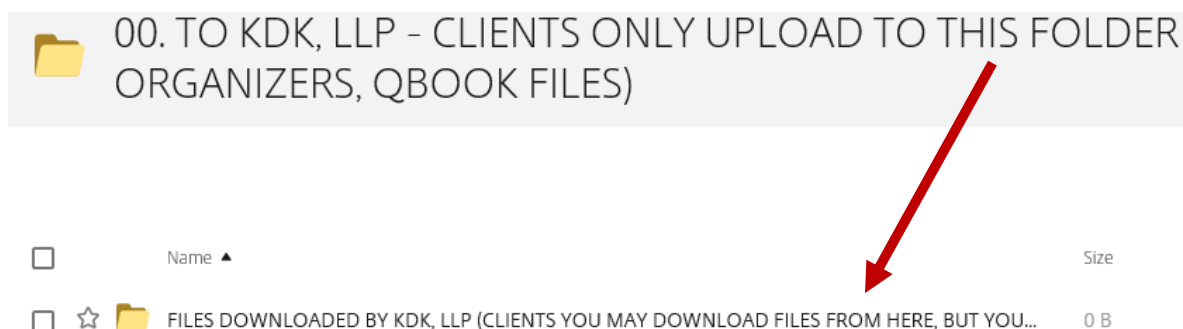


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1. Click on a year folder and you will have an expansion of folders set up to keep all your information organized. You will be able to log in as many times as you need to upload & download any of your information.



2. All items **UPLOADED** should be uploaded to → **00.0 TO KDK, LLP folder**, depending on the year. **You will see a 00.0 KDK, LLP folder for each year.
3. After KDK, LLP downloads your documents, we will then move your items to "Files Downloaded by KDK, LLP". You will have access to **DOWNLOAD** from this folder at any time, you are **not able to upload** to this folder.



NOTE: You are always able to **DOWNLOAD** your workpapers you submitted to KDK, LLP at any time.

Accessing your portal any time:

1. Enter the URL of the ShareFile account in the form of kdkcpa.sharefile.com in any Web browser.
2. Enter your username as your **email address** associated with the account.
3. Enter your password, and click **Log In**. You will be taken to the Dashboard menu.
****If you cannot remember your password, click *Forgot Password*.**

KDK
KURZMAN, DEMPSEY & KOWALKER, LLP
SINCE 1976

Email

Password

Sign In

☐ Remember Me [Forgot Password?](#)

Welcome to the Kurzman, Dempsey & Kowalker, LLP Portal

[Privacy Policy](#)

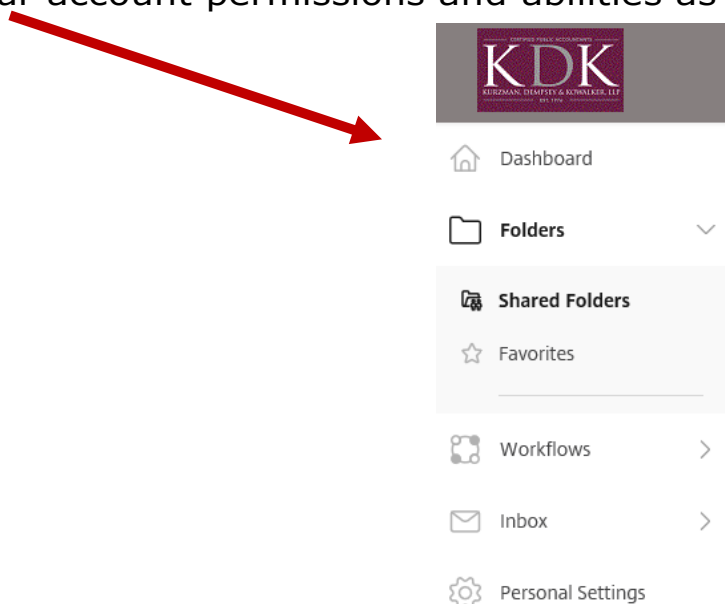
Password Requirements:

By default, all passwords must contain:

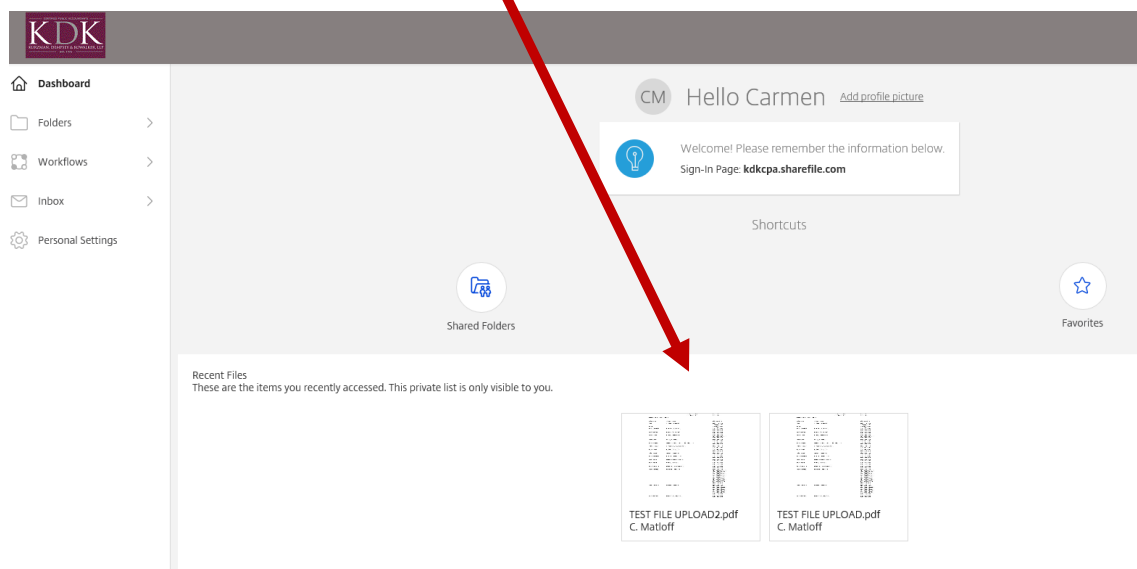
- Must contain a minimum of 8 characters
- Must contain 1 upper case and 1 lower case letter
- Must contain at least 1 number(s)
- Must contain at least 1 of these special characters below:
! " # \$ % ^ & * () - _ + = / . ? \ [] | ` ~ @ '

Portal features:

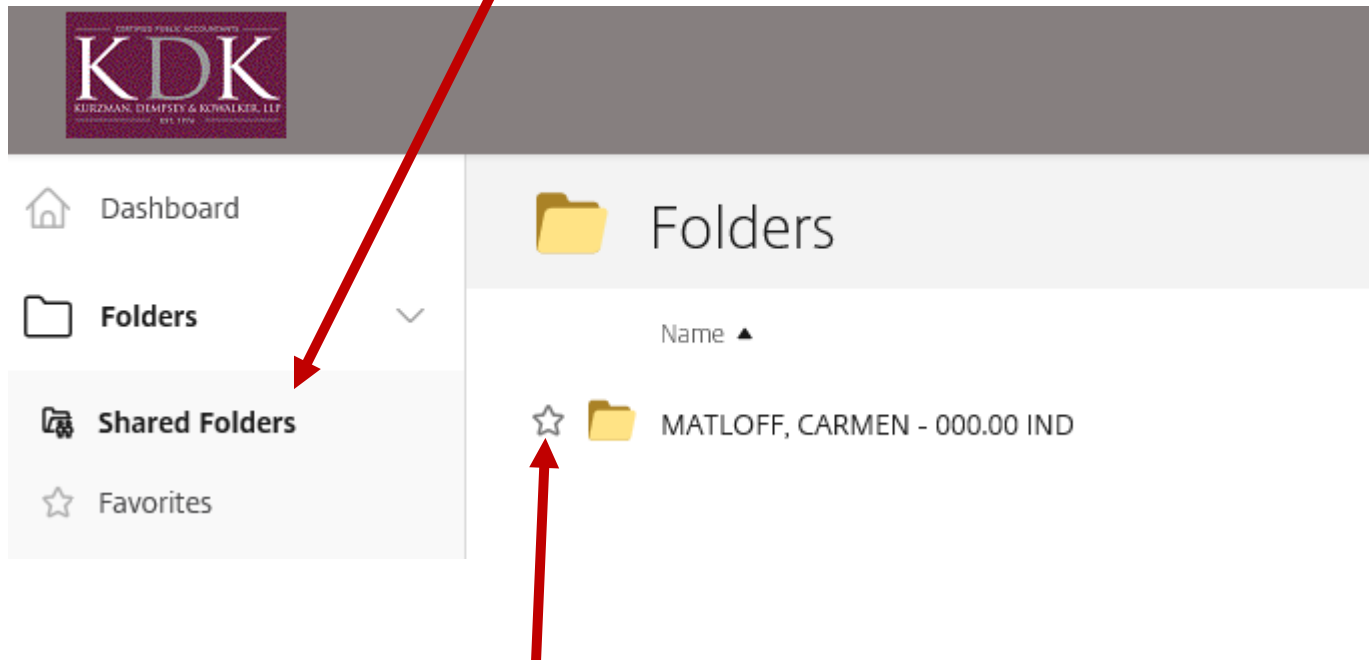
Side Menu: Menu items and buttons will be displayed depending on your account permissions and abilities as set by the Administrator.



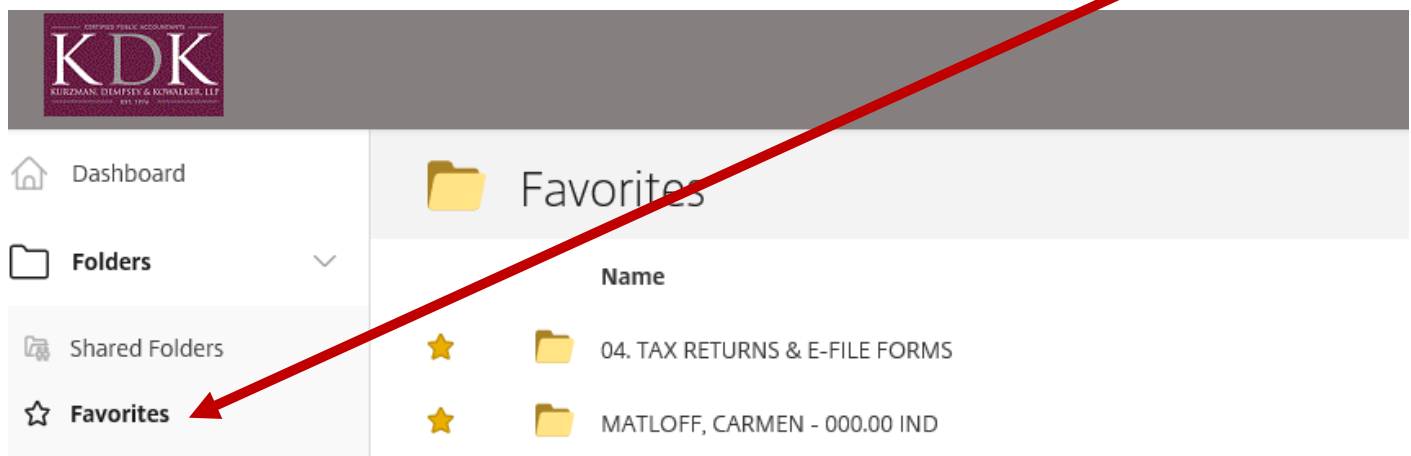
1. **The Dashboard** allows you to navigate your portal, this is helpful if you have more than one main folder. Also, recent files will display on your **Dashboard**. You will see up to 5 files that you previously accessed from the current web browser.



2. **Click on Folders → Shared Folders** is where your main folder(s) reside.



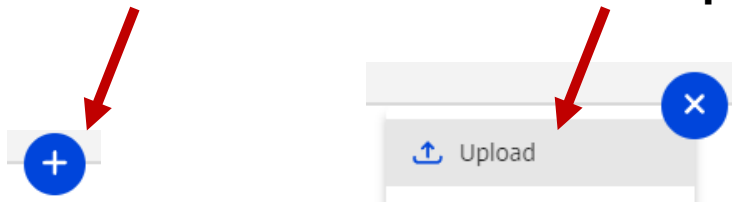
3. **Favorites** if you click on the **star next to any folder** it will create a shortcut to your favorites. If you are only interested in viewing my Tax Return folder and do not want to navigate, you can click the star and have easy access to your **Favorites**.



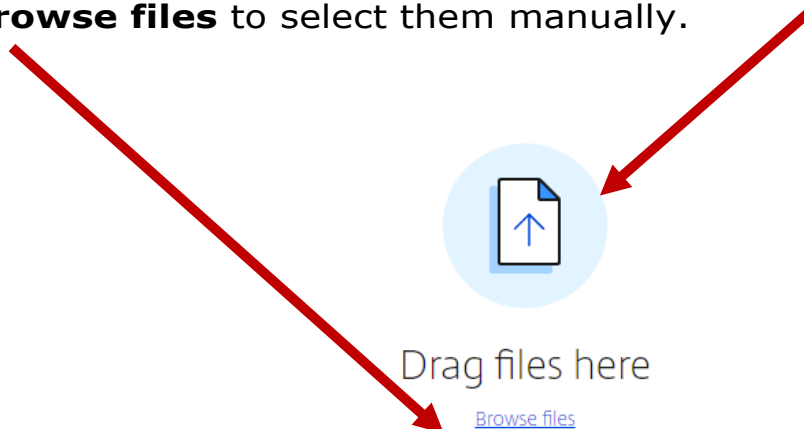
How to upload files to your portal account:

1. You may only upload files to folders where you have been given the Upload access.
2. Navigate to the folder where you wish to upload files.
 - Since you are a client user, your folder will be in the Shared Folders section of the account. (If you do not have folders to access, no folders have been shared with you.)

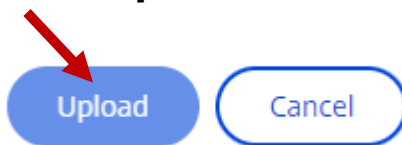
3. Access the **Blue Action** Button and **select Upload**.



4. Drag your files from your computer into the **Drag Files** here area **or** click **Browse files** to select them manually.



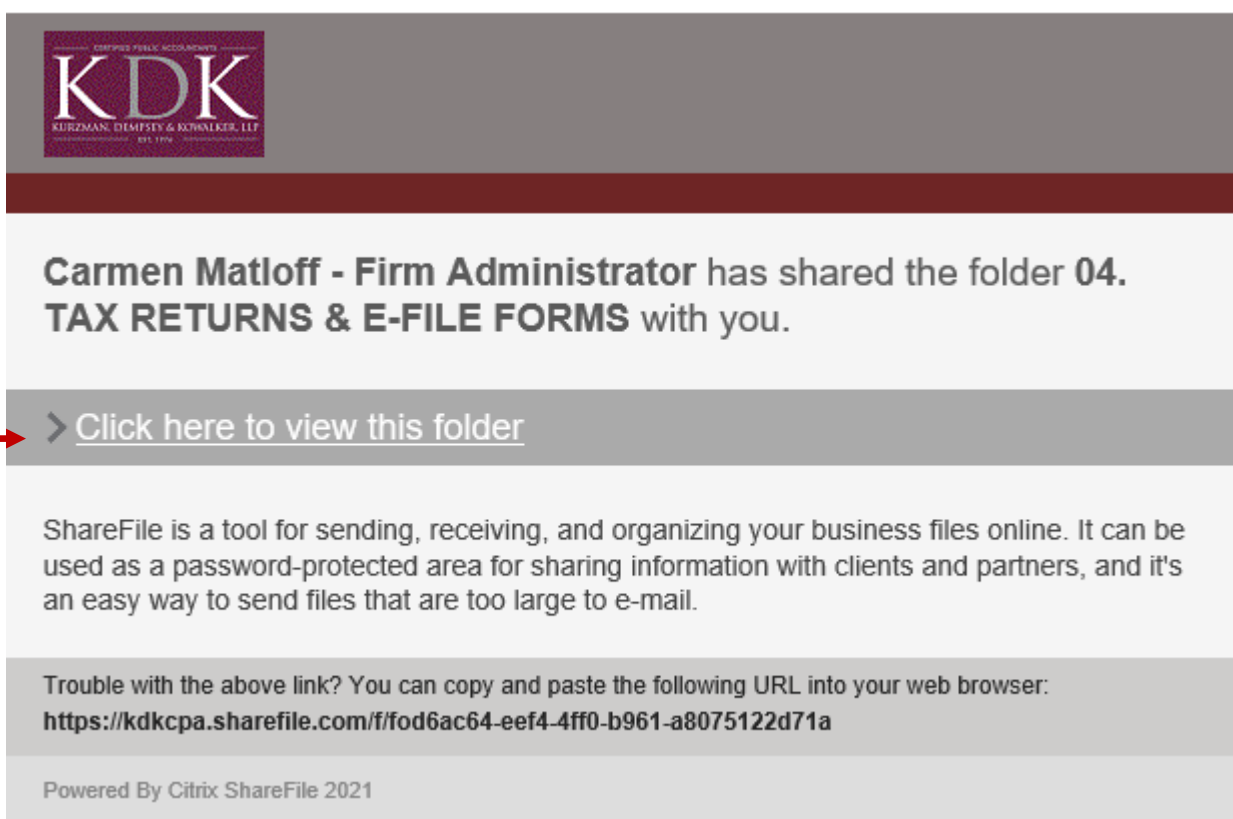
5. **Click Upload** on the lower left-hand side of your screen when ready.



- Your files will be uploaded. Upload speed can vary based on your internet connection.

How to download files from an e-mail ShareFile link:

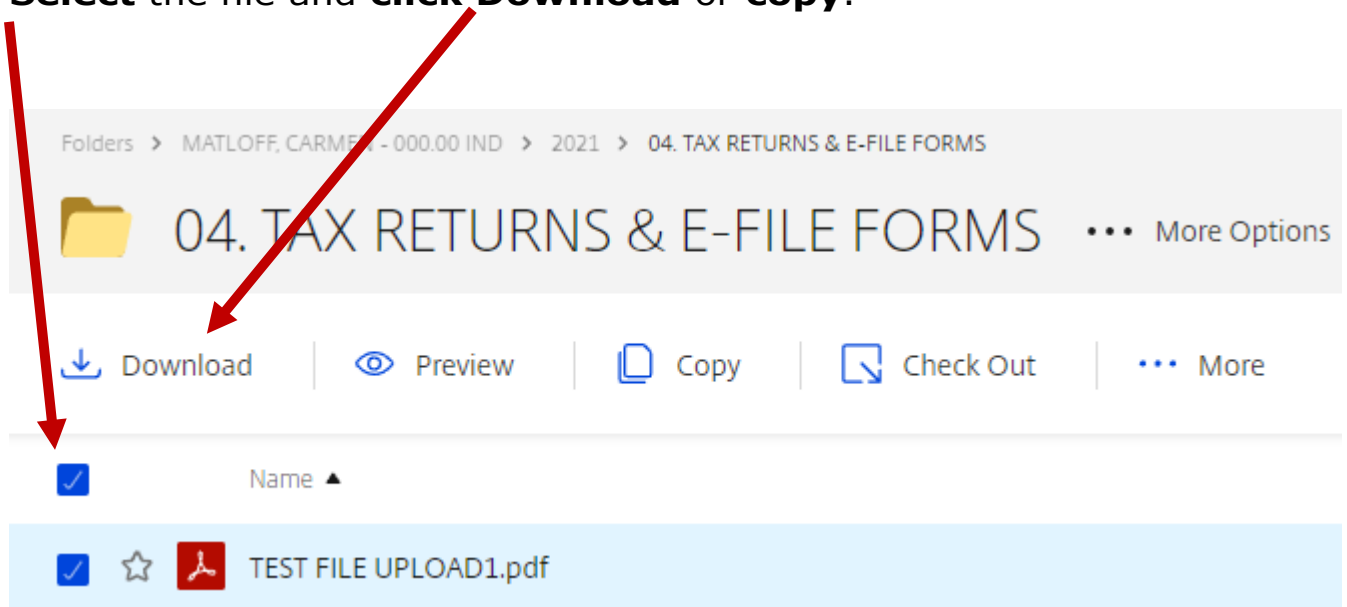
→ **Click the link** located in the email from the person sending you files. The link may appear as a **ShareFile URL** or a **Download button**. Note - Depending on the original sender's message settings, you may be required to enter your name and email address before you can upload any files.



1. On the download page, you can download and preview the file (or files). If you were sent a single file, the file will be displayed in the content viewer. Use the green Download button to download the files.
 - When downloading files from ShareFile, the files will be downloaded to your computer. Depending on your browser settings, you may be prompted to select where files should be downloaded to.

How to download files from ShareFile **without** an e-mail Link:

1. Log into your account with your username & password
2. Navigate to the folder in your ShareFile account that contains the file you wish to download.
3. **Select** the file and **click Download** or **copy**.



Note: You can download multiple files at once by using the checkboxes on the left side of each file name. Select the files then click the Download button that appears in the content menu above the file list. ***You can also preview, copy, or add to your favorites.***



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KBA RightSignature

RightSignature's KBA feature gives document senders the ability to enable knowledge-based authentication on a RightSignature document, effectively requiring the signers to verify their identity via a set of personal questions about the signer's identity before access to the document itself is granted.

Kurzman, Dempsey & Kowalker, LLP will use the KBA feature in RightSignature on all forms that have personal information (SS#). The KBA feature was developed to support the identity verification requirements of the IRS guidelines on collecting electronic signatures on Forms 8878 and 8879.

RightSignature

Kurzman, Dempsey & Kowalker, LLP will use RightSignature with **KBA disabled** for **Engagement letters** and any other form that does not have personal information.



ShareFile & RightSignature - Video Gallery:

[Introducing ShareFile](#)

[How to share a file](#)

[How to upload a file](#)