



## Share Safe Client Guide

### Sending a file with Share Safe:

You can send up to 20 files per message, up to a limit of 1 GB total size.

1. Enter the firm-specific URL in a Web browser (<https://www.clientaccess.com/sharesafe/#/H2RCPA>), or click on the link from our website.
2. Enter your email address and name. Optionally, you can also enter your company name and contact number.
3. Click **Send a File**.
4. In the *Send file to* box, select the name of the person you are sending the file to, if it is not already selected.
5. Enter a subject for the message.
6. Enter your message.
7. To add files to the message, either drag and drop files on the Files box, or click **Add File** to select files.
8. Click **Send**.
9. Click **Logout**.

### Receive a file with Share Safe:

When a firm member sends you a file, you will receive two emails. The first email includes a hyperlink to your file. The second email includes a file access key that you must enter before you can download the files. Once you receive these emails, do the following to download your files:

1. Click the firm-specific hyperlink in the first email message.
2. Enter your email address and name. Optionally, you can also enter your company name and contact number.
3. Click **Download a File**.
4. Copy the file access key from the second email message, and paste into the **Enter File Access Key** box.
5. Click **Submit**.
6. Click **Download** to begin downloading all the listed files. If you only want to download some of the listed files, select the check boxes for those files before clicking download. Please note - If multiple files are downloaded at one time, they will be packaged in a ZIP file.
7. Click **Logout**.