



# **Sage AssuredSend™**

## **User Quick Start Guide**

Version 1.0

LeapFILE, Inc.  
[www.leapfile.com](http://www.leapfile.com)  
[support@leapfile.com](mailto:support@leapfile.com)  
1-888-716-9380



## Logging In

If you are a new user to the account, you will receive an automated email message from Sage AssuredSend indicating your initial account password as well a link to Sage AssuredSend where you log in. If you are a returning or existing user, just login into <http://www.sagesend.com> directly.

1. Go to <http://www.sagesend.com>
2. Click on **Account Login** on the top right of the page
3. Enter your email and password. You will be taken to the “Start” page of your account.

## Sending File(s)

1. Once you are logged in to your account, click on **New Transfer**
2. Fill out the necessary info in the input boxes:
  - a. On the “Send Files” page, enter the email addresses of the intended recipient(s) of your file(s) to be transferred.
  - b. Enter a subject title in the “Subject” line as you would in any email application.
  - c. You can type in a message in the “Message” area if desired.
  - d. Check whether you would like to include message with download notification.
  - e. If you would like an additional security measure, you can designate a receiver authentication question by choosing either **Email** (selected as default) or **Define your own security question and answer**. Your recipient will then need to provide their email address or the answer to the security question that you designate before they can download your files.
  - f. If you would like to set up notification and/or expiration settings, just click on **[+] Show optional setting**.
  - g. Under **Set notification options**, select whether you would like to automatically send the recipient(s) an email with download instructions, or if you would like to do that manually.
  - h. Under **Set email confirmation options**, select whether you would like to get confirmation messages. Checking any of these boxes will automatically send you an email to notify you when your transfer has been sent, when your recipient has received the transfer email, and when your recipient has successfully downloaded your files, respectively.



- i. In the block of **Set advanced options**, you can decide when the file will be expired. The automatic expiration date of your transfer is set to 7 days by default. You can change it to 1-7 days if you choose to do so.
3. If you want to upload file(s) individually, click on **Add File(s)** near the bottom of the page.
  - a. After you have uploaded all your file(s) for transfer, click **Upload & Send Now** to send the files, or **Upload & Review Draft** to get a detailed view of your transfer before you send it.
4. If you would like to add multiple files or folders, click on **Add File(s) & Folder(s)**. With this option, you can either click **Add** and select multiple files and/or folders in the pop-up window, or you can simply drag and drop the selected file(s) and/or folder(s) into the file list. To remove any files you do not want to transfer from the list, either select each one individually and click **Remove**, or click **Remove All**.

\*Please note that you will need to download the latest Java plugin in order to use this feature. Instructions on how to download the latest version of Java is provided on the site if you do not already it.

5. If you do not want to send the file(s) at this point, you can choose to **Save As Draft** for transferring the file at a later time.
6. After you send the files, your recipients will then receive an email notification that a file is being transferred to them. All they need to do is to follow the instructions in the email to download the file.
7. If you have saved a transfer as a draft, you can come back to view and modify it at a later time by clicking on **Transfers** and then **Draft Transfers** in the menu bar near the top of the page.

## Canceling A Transfer

If you have sent out a file transfer that you want to cancel, you can do so by:

1. Go to the **Transfers** section in the menu bar near the top of the page
2. Click on **Outgoing Transfers**.
3. Find the transfer that you want to cancel and click on **details** next to it.
4. Click **Cancel Delivery**.
5. The transfer will be cancelled for all recipients who have not yet downloaded the file(s). The files that have already been downloaded by recipients cannot be recalled.



## Adding Contacts

1. Click on **Contacts** in the menu bar near the top of the page
2. Click on the **Add Contact** button
3. Enter the new contact info
4. Click **Save** or **Save & Add Another Contact** or **Cancel**
5. You can also bulk import your contact list if the list is saved as a .CSV (comma separated value) file. Click on **Import Contact List** under the **Contacts** section and follow the instructions provided on the page.

## Changing Your User Password

1. Click on **Account** in the menu bar near the top of the page.
2. Click on **Change Password**.
3. Enter your current password.
4. Enter your new password and confirm it by entering it again in the box below it.
5. Click **Save**.

## Your Clients/Guests Sending Files To You\*

### **Directions for your clients/guests:**

1. Direct your clients/guests to go to <http://secure.sagesend.com>.
2. Your client will then click on **Secure Upload**
3. Your client then enters your email address in the "Recipient Email" field
4. Click **Start**
5. Then, your client just needs to fill out the form that is very similar to sending an email, and upload the file(s) s/he wants to send to you.

### **Directions for you:**

1. Once a client has initiated a file transfer to you, you will receive an email notification. To download the files, you will need to login to your Sage AssuredSend account.
2. After logging in to your account, click on **Transfers**, and then **Incoming Transfers** in the menu bar near the top of the page.
3. A list of all your incoming transfers will be displayed. Click on the transfer that you wish to download, and then click **Download**.
4. Make sure you save the file instead of just opening the file. Files transferred through Sage AssuredSend will automatically expire and be removed from our servers after you have successfully downloaded the file. If you did not save the



Sage AssuredSEND

Powered by LeapFILE

LeapFILE, Inc.  
[www.leapfile.com](http://www.leapfile.com)  
[support@leapfile.com](mailto:support@leapfile.com)  
1-888-716-9380

---

file to your local hard drive, you will not be able to access the file again within Sage AssuredSend.

**\*Note** – This feature is only available on Sage AssuredSend Ultra level accounts.

For additional questions, please contact us at:

[www.leapfile.com](http://www.leapfile.com)  
[support@leapfile.com](mailto:support@leapfile.com)  
1-888-716-9380