



## How to upload files to CLM using Share File portal

Within our Client Portal begin by selecting the following link.



Once you have reached CLM's ShareFile FileDrop, enter your contact information. *Please note, you do not need special credentials to send files with FileDrop.* The company field is not required but recommended if you are a business.



To continue, please enter your information below.

Email

First Name

Last Name

Company

Remember Me

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

You must select a recipient from the drop down menu first. Staff are organized in alphabetical order by last name.

Upload Files to 'CLMCPA Client File Drop'

Recipient  
Choose Recipient ▾

Drag files here  
[Browse files](#)

Upload

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

After a recipient is selected you may now add files for upload. To add files you may either drag them into the white box area on screen or select “Browse Files” to add them. You may upload multiple files or one.

Upload Files to 'CLMCPA Client File Drop'

Recipient  
Bald, Ray ▾ [clear](#)

Drag files here  
[Browse files](#)

Upload

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

Once you have selected all the files you would like to upload, click the “Upload” button at the bottom left of the screen.

Upload Files to 'CLMCPA Client File Drop'

Recipient: Bald, Ray [clear](#)

1 item [Clear all](#) [+ Add more](#)

Tax File.docx	11.57 KB
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[Upload](#)

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

Once the file has uploaded successfully you will see the text “Uploaded” next to its name. You will also receive a confirmation e-mail with the files successfully uploaded.

Upload Files to 'CLMCPA Client File Drop'

Recipient: Bald, Ray [clear](#)

Tax File.docx	<b>Uploaded</b>	11.57 KB
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Drag files here [Browse files](#)

[Upload](#)