# Uploading to ShareFile
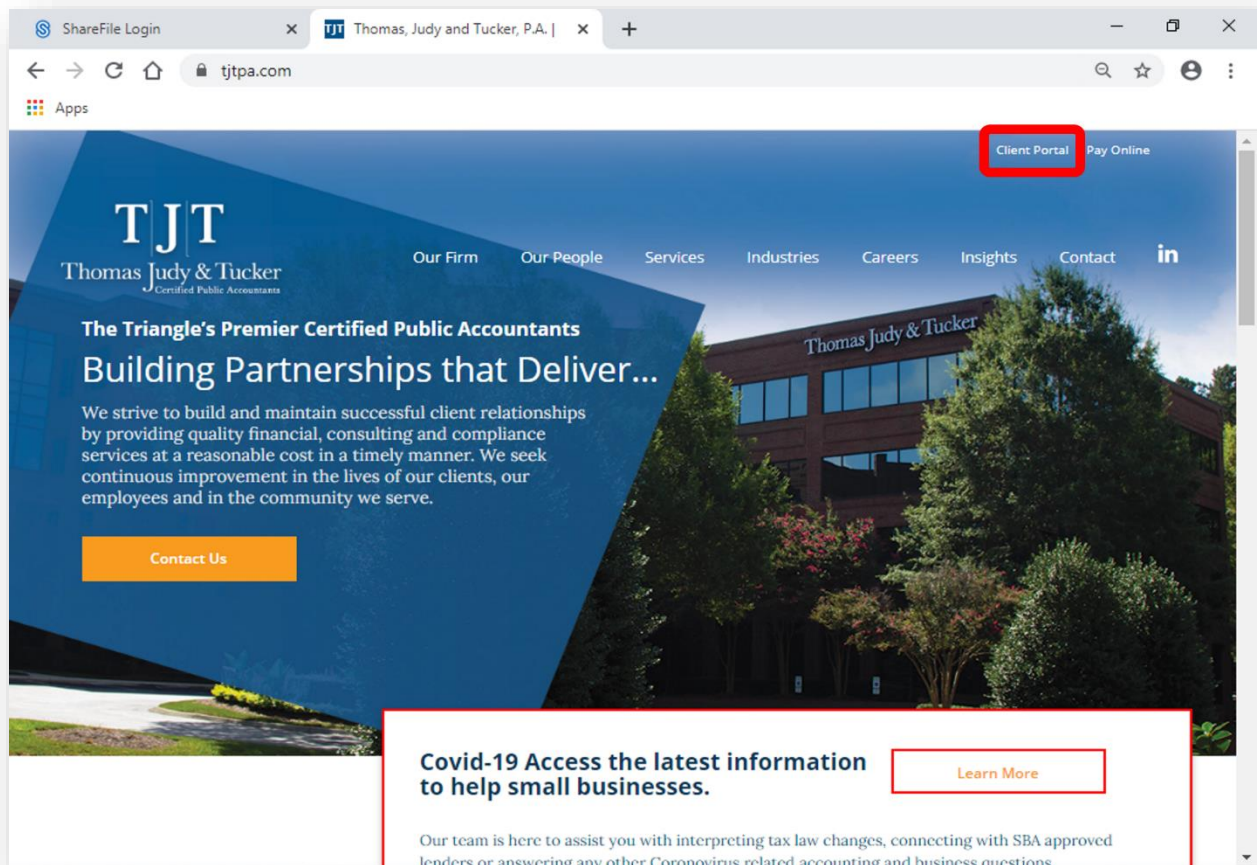
**Thomas Judy & Tucker**
Certified Public Accountants

**Page one features step-by-step instructions without pictures for a quick read.**
**Page two and beyond feature identical instructions with pictures.**

1. Navigate directly to the ShareFile login page by going to tjtpa.sharefile.com.
   (Note: do not enter 'www.' for the above address.)
   Alternately, go to our homepage at www.tjtpa.com and press the "Client Portal" button at the top of the page.

2. Use the 'Client Sign-In' section on the right to login using your email address.
   This will be the same email address you provided when we setup your account with TJT.
   If you need help with your password please use the 'Forgot Password' link under the sign in button.

3. You should see folders that represent each client entity on which we're partnered.
   If you don't see this page, press '**Folders**' on the left and choose '**Shared with Me'** to find the right page.

4. To upload Tax or Audit information for us, go into the 'From Client' folder.
   (When we complete and upload files for you, we will place them in the '**For Client**' folder.)

5. Inside the FROM Client Folder are some additional folders to assist with data organization. You may click into one if needed or just remain inside this folder. Choose your Tax Year.

   Then, find and hover over the blue **+** symbol to reveal the hidden "Upload" button.

6. Choose files to upload. You can drag-and-drop them from your computer, or press the 'Browse files' link.

7. When you have added files, they are put into a temporary list so you can review or edit your selection. Press the 'Upload' button to send the files to us through ShareFile.

8. During upload you should see a list of every file including your current uploads.
   Notice the progress bars on each individual file that you are uploading.
   Do not close the page until all the progress bars are full and each file is shown in full color.

9. The upload is complete!
   Feel free to reach out to our staff to let us know you are done uploading everything. We're here to help, so feel free to ask questions!

**Page one above contained each of the nine steps you needed in order to complete an upload. The remaining pages below are the same steps with pictures; we hope you find them helpful.**

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   (Note: do not enter 'www.' for the above address.)
   Alternately, go to our homepage at www.tjtpa.com and press the "Client Portal" button at the top of the page.

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3. You should see folders that represent each client entity on which we're partnered.
   If you don't see this page, press '**Folders**' on the left and choose '**Shared with Me**' to find the page as seen below.

4. To upload Tax or Audit information for us, go into the 'From Client' folder.
   (When we complete and upload files for you, we will place them in the '**For Client**' folder.)
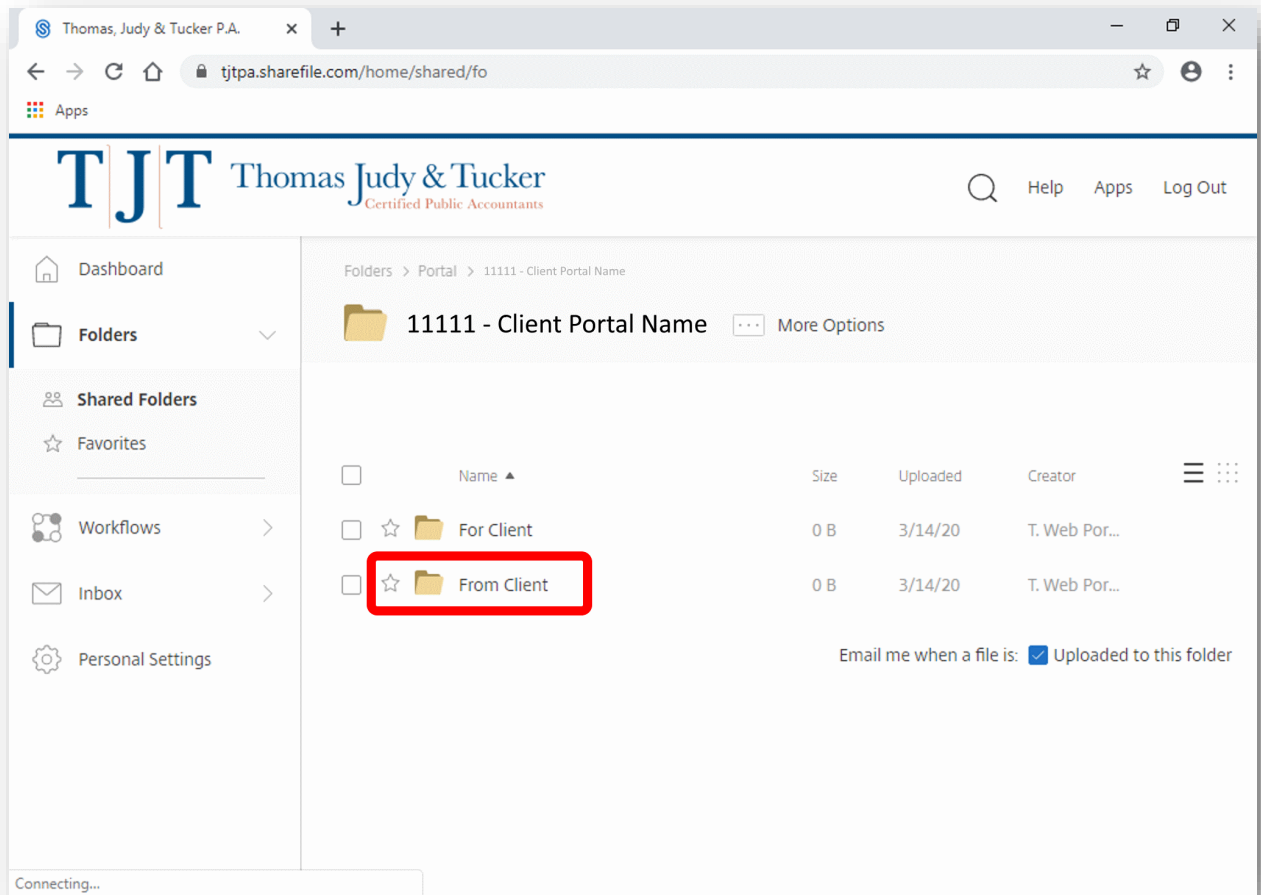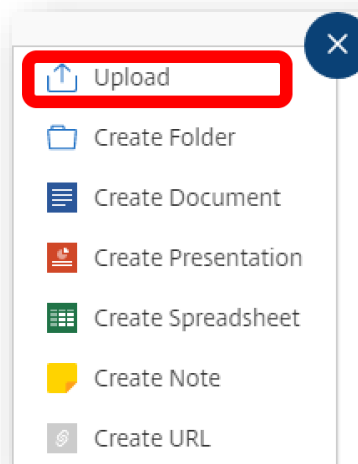
5. Inside the 'From Client' folder are some additional folders to assist with data organization. You should click into the folder pertaining to the same tax-year as the files you are uploading.
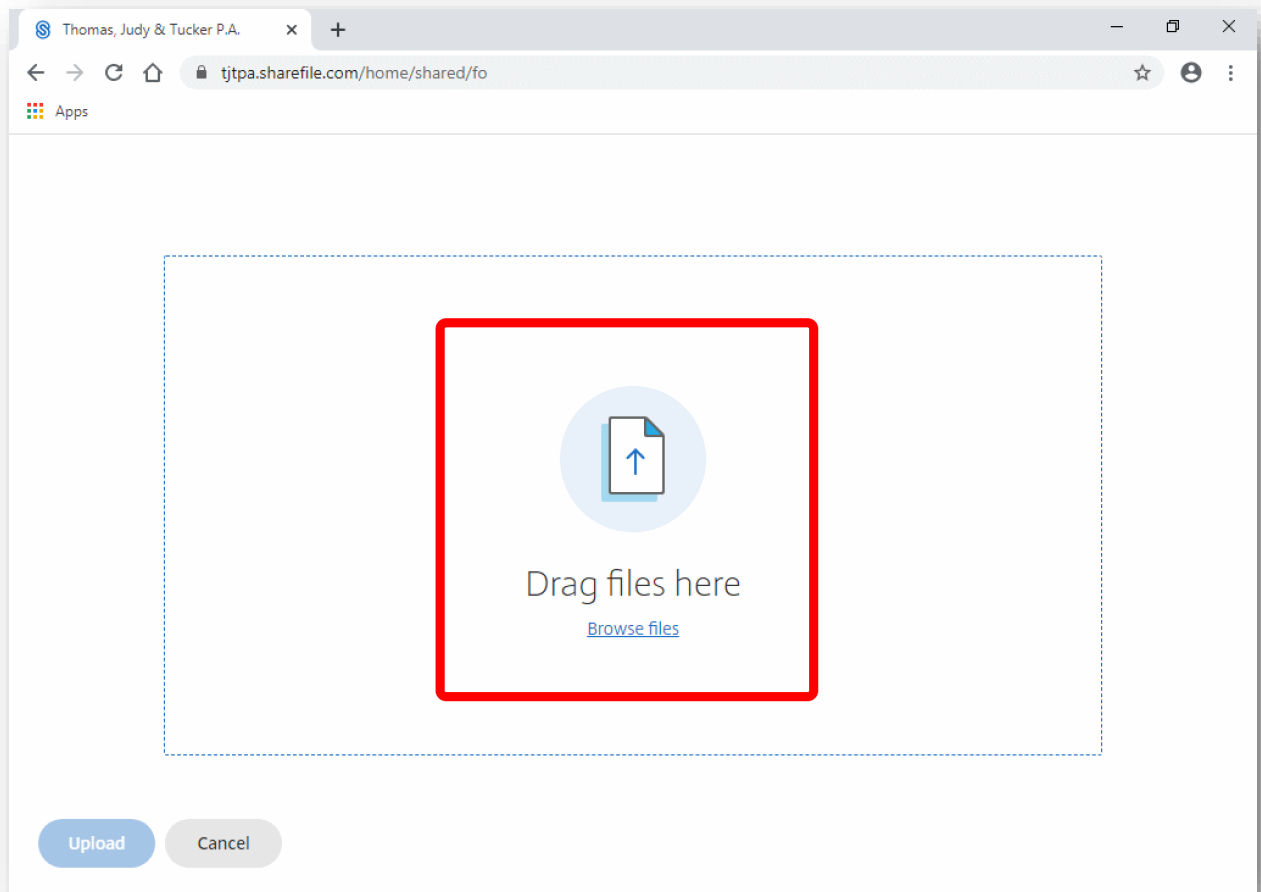
Then, find and hover over the blue **+** symbol to reveal the hidden "Upload" button.
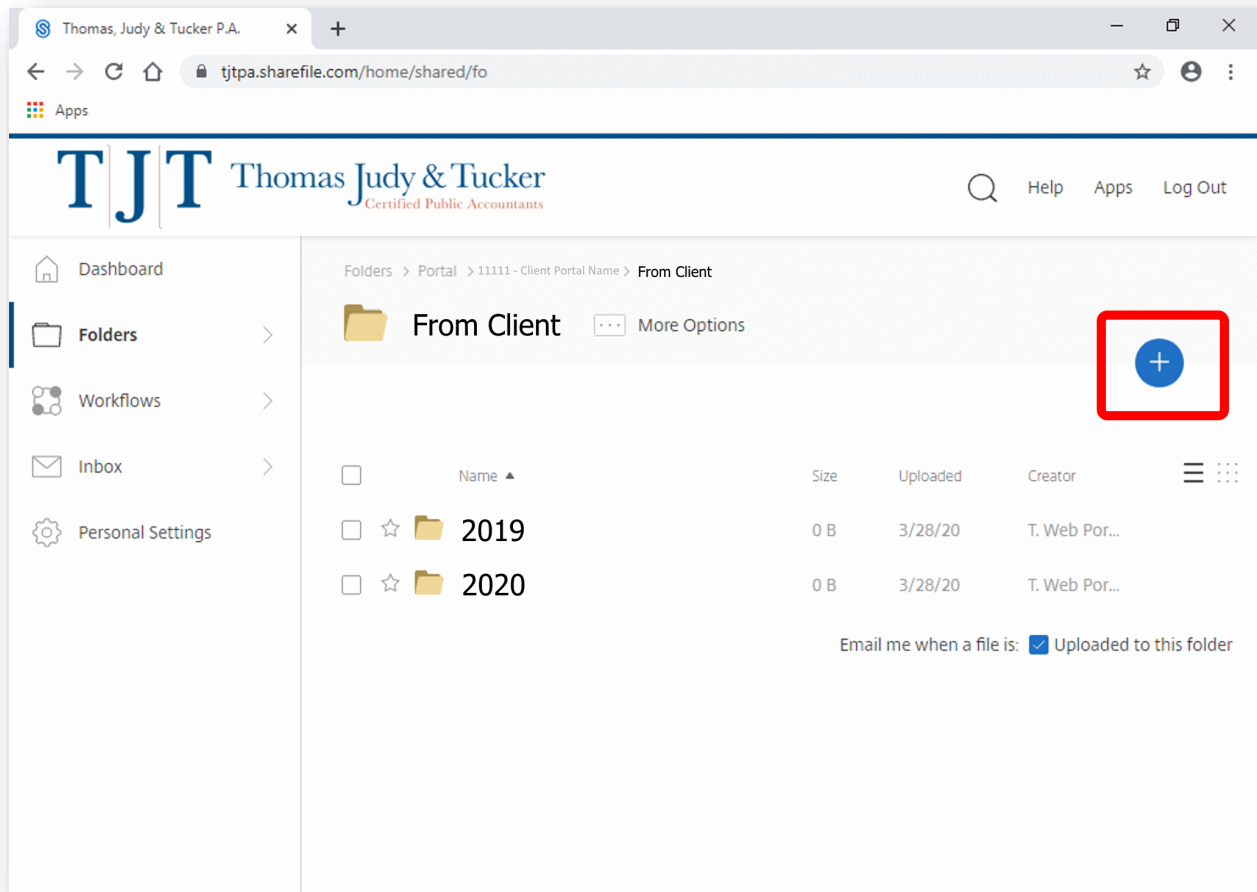


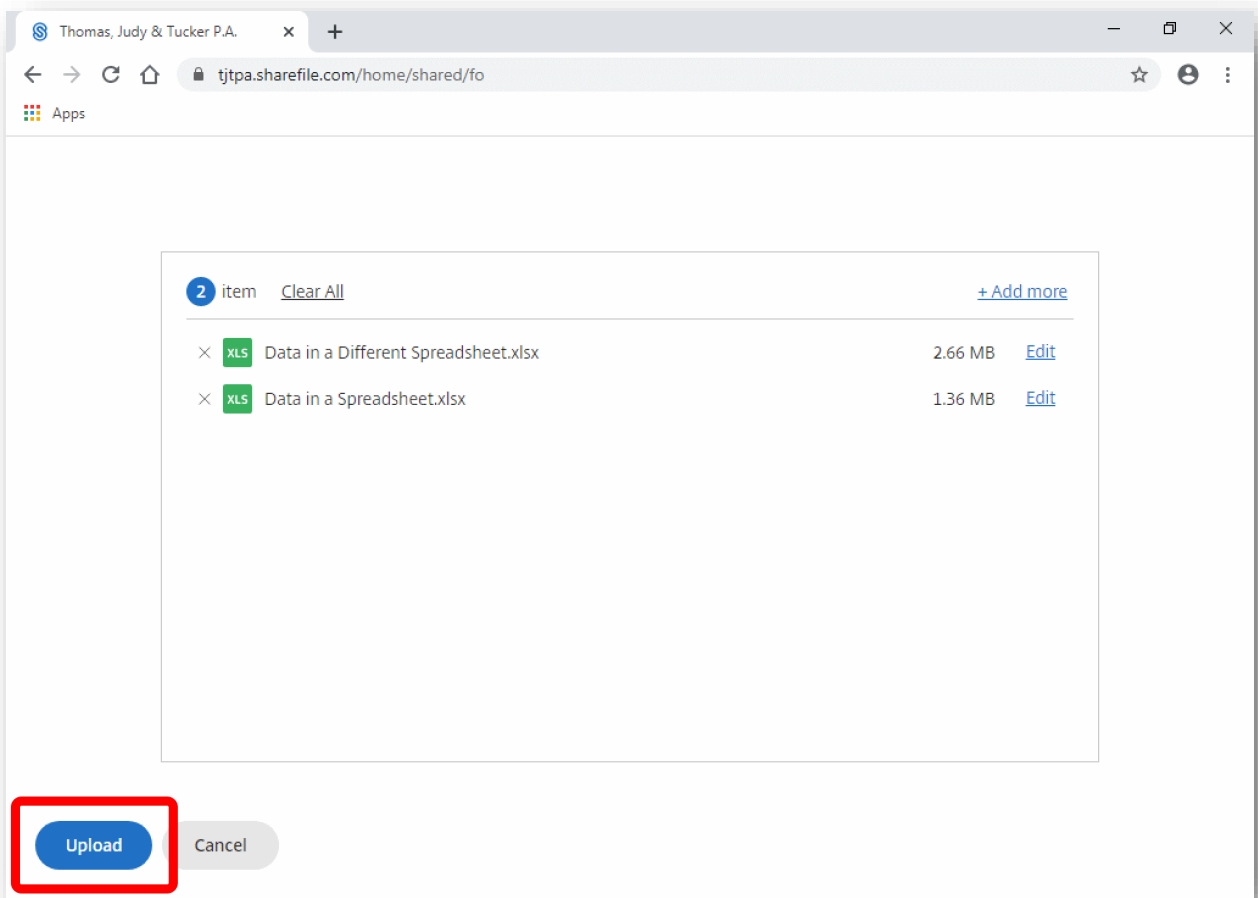This is what the hidden menu looks like after it is open.

6. Choose files to upload. You can drag-and-drop them from your computer, or press the 'Browse files' link.

7. When you have added files, they are put into a temporary list so you can review or edit your selection.
Press the 'Upload' button to send the files to us through ShareFile.

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