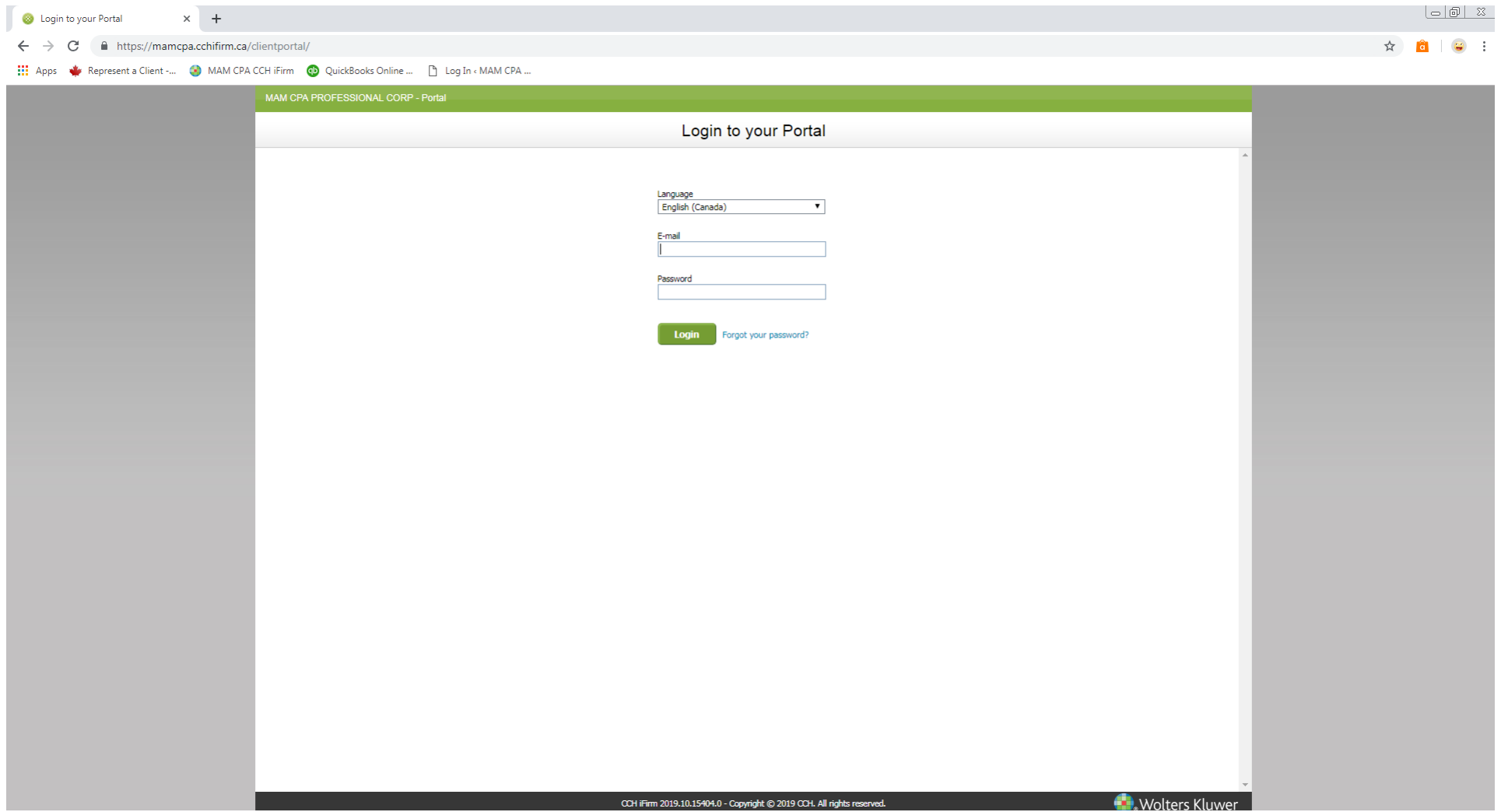


# HOW TO UPLOAD DOCUMENTS TO THE MAM CPA CLIENT PORTAL

**Step 1:** Open your internet browser and type or copy and paste the following web address to reach the MAM CPA Client Portal: <https://mamcpa.cchifirm.ca/clientportal/>

The following page will be displayed.



The screenshot shows a web browser window with the address bar displaying <https://mamcpa.cchifirm.ca/clientportal/>. The browser tabs include "Login to your Portal", "Represent a Client ...", "MAM CPA CCH iFirm", "QuickBooks Online ...", and "Log In < MAM CPA ...". The page content features a green header with "MAM CPA PROFESSIONAL CORP - Portal" and a white box titled "Login to your Portal". Inside this box, there is a language dropdown menu set to "English (Canada)", an "E-mail" input field, a "Password" input field, a green "Login" button, and a link for "Forgot your password?". The footer of the page contains the text "CCH iFirm 2019.10.15#04.0 - Copyright © 2019 CCH. All rights reserved." and the Wolters Kluwer logo.

**Step 2:** Enter your login credentials and click the login button.

MAM CPA PROFESSIONAL CORP - Portal

### Login to your Portal

Language  
English (Canada) ▼

E-mail  
uazam@mamcpa.ca

Password  
.....


[Login](#) [Forgot your password?](#)

**Step 3:** Upon login, the following page will be displayed. To start uploading your documents, click the “My Documents” tab on the left side of the screen (as shown in the Red box).

MAM CPA PROFESSIONAL CORP Urooj Azam | Logout | Help

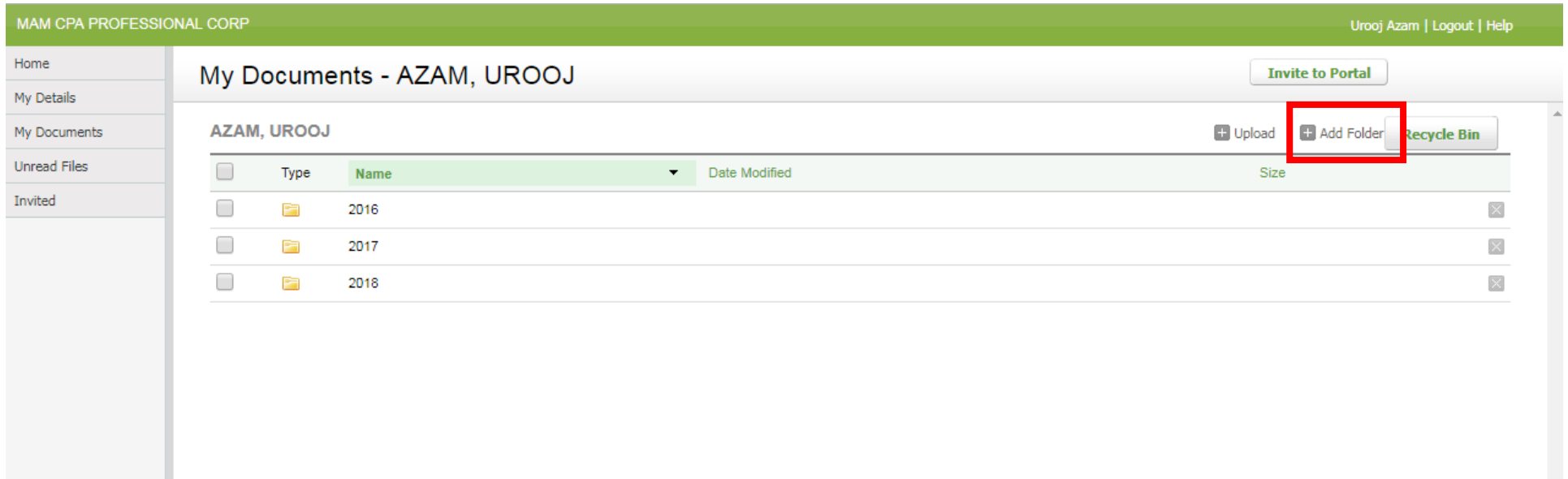
Home  
My Details  
**My Documents**  
Unread Files  
Invited

## MAM CPA Professional Corporation -Client Portal



**Welcome to Our Client Portal**

**Step 4:** Once you are on the “My Documents” page, there should already be folders available for you to upload in. If you need to add a folder, the “+Add Folder” button is conveniently located at the right side of the screen (as shown in the Red box). To start uploading documents into the folder, choose the respective folder.



MAM CPA PROFESSIONAL CORP Urooj Azam | Logout | Help

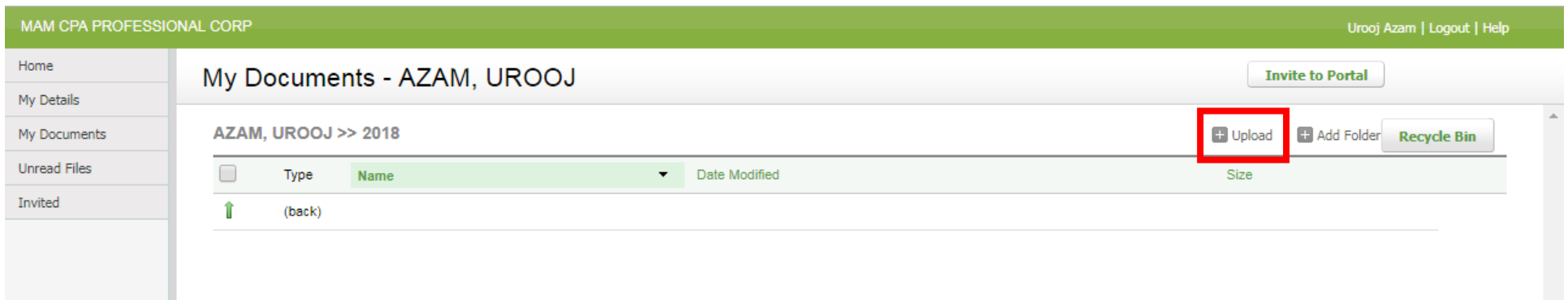
Home My Details My Documents Unread Files Invited

My Documents - AZAM, UROOJ [Invite to Portal](#)

AZAM, UROOJ [+ Upload](#) [+ Add Folder](#) [Recycle Bin](#)

| <input type="checkbox"/> | Type | Name | Date Modified | Size |
|--------------------------|------|------|---------------|------|
| <input type="checkbox"/> | 📁    | 2016 |               | ✕    |
| <input type="checkbox"/> | 📁    | 2017 |               | ✕    |
| <input type="checkbox"/> | 📁    | 2018 |               | ✕    |

**Step 5:** The screen shown below will be displayed once you have chosen the folder. To start uploading documents, click the “+Upload” button located at the right side of the screen (as shown in the Red Box).



MAM CPA PROFESSIONAL CORP Urooj Azam | Logout | Help

Home My Details My Documents Unread Files Invited

My Documents - AZAM, UROOJ [Invite to Portal](#)

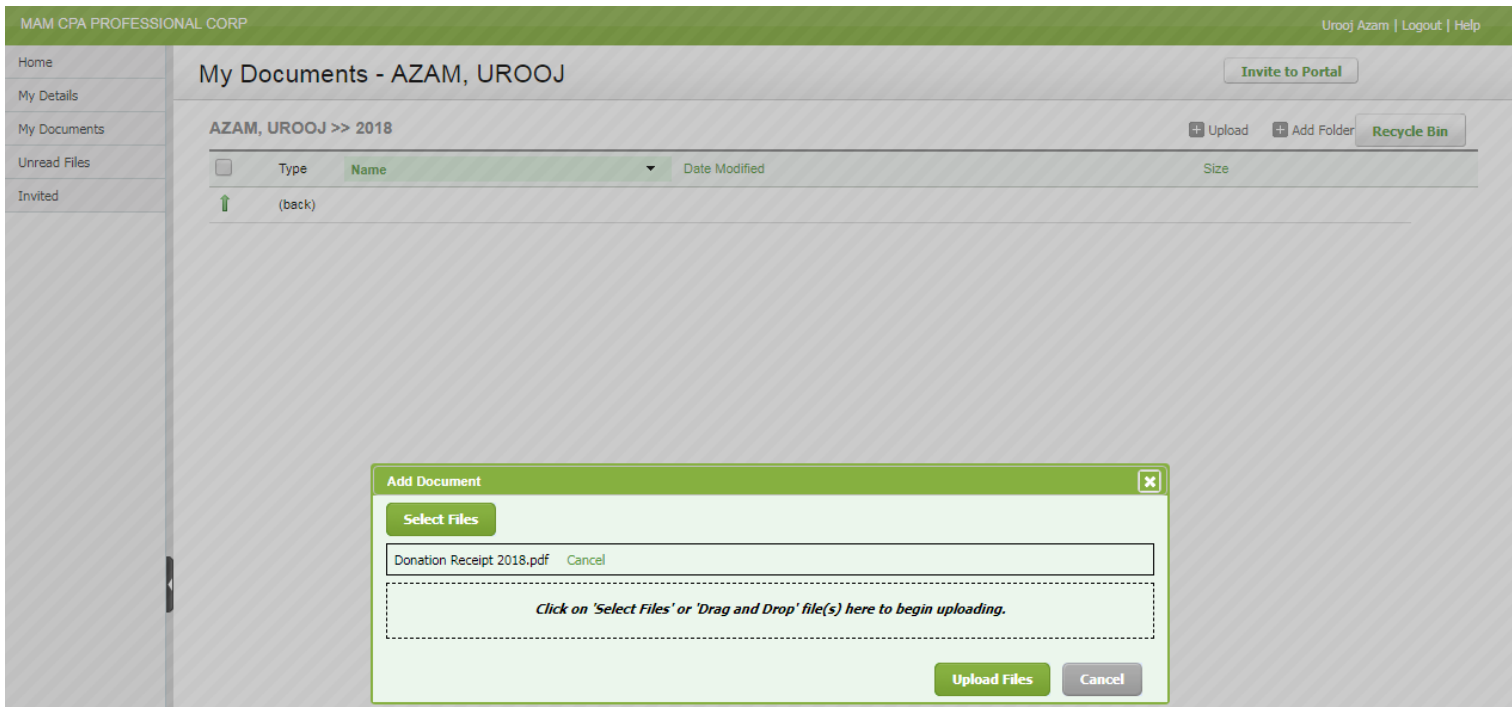
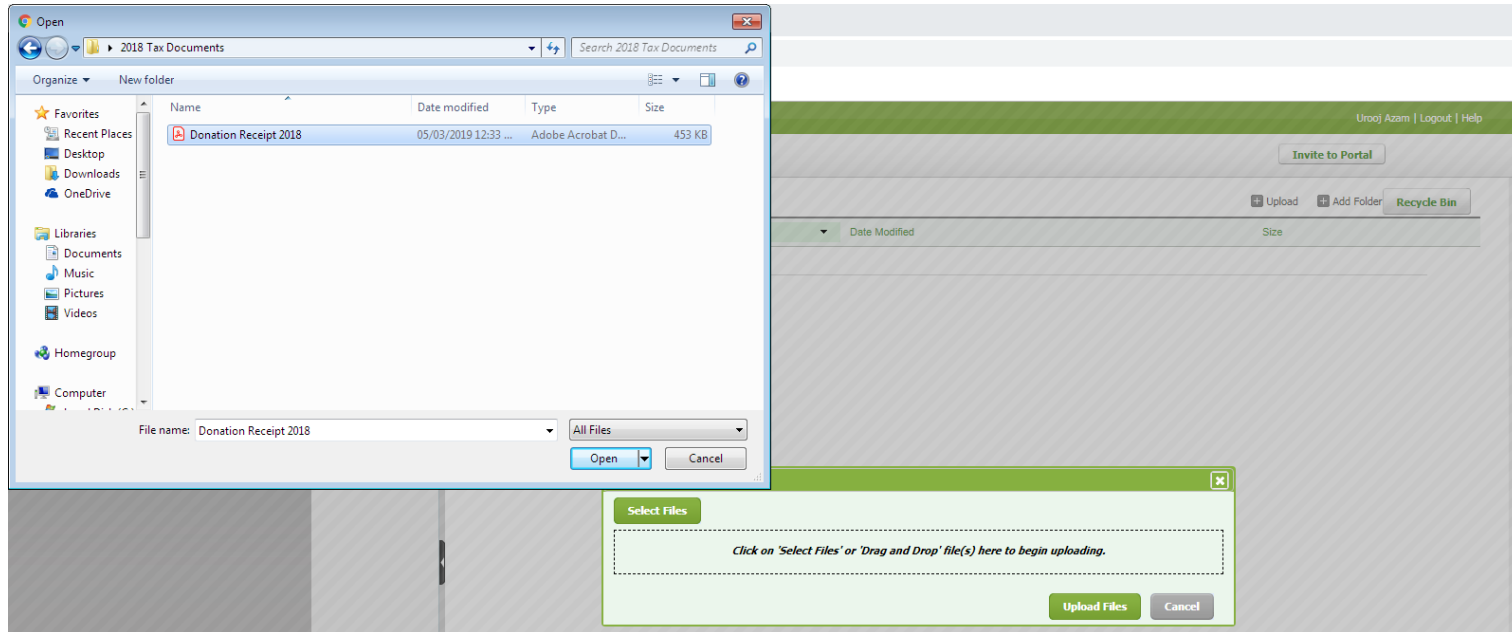
AZAM, UROOJ >> 2018 [+ Upload](#) [+ Add Folder](#) [Recycle Bin](#)

| <input type="checkbox"/> | Type | Name   | Date Modified | Size |
|--------------------------|------|--------|---------------|------|
| <input type="checkbox"/> | ↑    | (back) |               |      |

**Step 6:** To choose the documents you wish to upload, click the “Select Files” button (as shown in the Red Box).

The screenshot displays a web portal interface for document management. At the top, the header reads "MAM CPA PROFESSIONAL CORP" on the left and "Urooj Azam | Logout | Help" on the right. The main content area is titled "My Documents - AZAM, UROOJ" and includes an "Invite to Portal" button. Below this, there are options for "AZAM, UROOJ >> 2018", "Upload", "Add Folder", and "Recycle Bin". A table with columns for "Type", "Name", "Date Modified", and "Size" is visible, with a "(back)" link below it. A dialog box titled "Add Document" is open in the foreground, featuring a "Select Files" button highlighted with a red box, a dashed-line drop area with the text "Click on 'Select Files' or 'Drag and Drop' file(s) here to begin uploading.", and "Upload Files" and "Cancel" buttons at the bottom.

**Step 7:** Locate the document on your computer and click “open”. Once the document displays in the add document window, click “Upload Files”. (Please note, you can also upload multiple files at the same time, by selecting them all at once).



**Step 8:** Once the file has successfully uploaded, it will display in the folder.

The screenshot shows a web portal interface for 'MAM CPA PROFESSIONAL CORP'. The user is logged in as 'Urooj Azam'. The main content area is titled 'My Documents - AZAM, UROOJ'. Below this, there is a sub-section for 'AZAM, UROOJ >> 2018'. A table with columns 'Type', 'Name', 'Date Modified', and 'Size' is visible, with a '(back)' link. An 'Add Document' dialog box is open in the foreground, showing a progress bar for 'Donation Receipt 2018.pdf' at 42% of 462.87kB. The dialog includes 'Select Files', 'Upload Files', and 'Cancel' buttons.

The screenshot shows the same web portal interface. The 'Add Document' dialog box is no longer present. The table in the 'AZAM, UROOJ >> 2018' section now contains one entry: 'Donation Receipt 2018.pdf' with a date modified of '05/03/2019' and a size of '452 KB'. The table has columns for 'Type', 'Name', 'Date Modified', and 'Size'.

**If you experience any difficulty during this process, please call us at 905-338-7800.**