4. Instructions for your clients

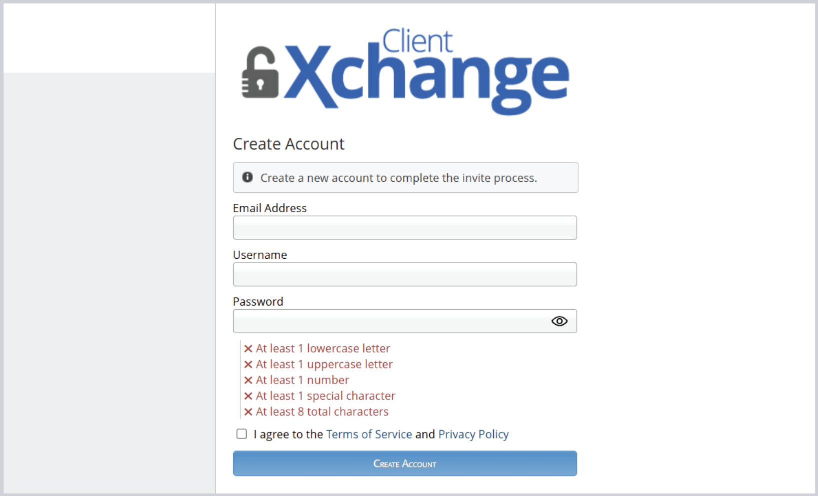
Below are instructions to provide your clients. (Copy and paste into an email or a document printed on your letterhead.)

Activating your Client Xchange account

You will receive an email invitation from noreply@mytaxdocs.com that contains a link unique to you for security purposes. You must click on the link in your email in order to activate your account.

Enter your email address, a username, and a password (see screenshot below) to create your account. You will be asked to confirm your email and enable multi-factor authentication in order to complete the account creation.

Hint: *Bookmark that webpage so you can easily access the website in the future.*



After your account is activated, you can start uploading and downloading files immediately. You will receive an email from noreply@mytaxdocs.com whenever I have uploaded a file to your File Cabinet. Similarly, I will receive an email whenever you have uploaded a file.

If you need assistance, please contact me directly (do not reply to your invitation email, as it is a no reply address).

Uploading/editing/deleting files

You can upload just about any file type into Client Xchange. For example:

- Forms received such as W-2s, 1099s, 1098s
- Microsoft Office (Word, Excel, etc.) files
- .csv files of stock transactions
- Any scanned documents (including .pdf and .tif)
- Photos of documents, receipts, statements, etc. (including .jpg and .gif)

To upload a file:

1. Select the folder in which you want to save the file.
2. Click **Add File** on the far right.
3. Browse to the file location, select the file, then click **Open.**

To edit a file name:

1. Select the folder where the file is saved.
2. Locate the file and click the **pencil icon** on the right.
3. Edit the file name and click **Save**. To cancel editing, click the icon of a circle with a line through it.

Note: *Modifying or removing the extension (e.g., .pdf) will NOT change the file type.*

To delete a file:

1. Select the folder where the file is saved.
2. Locate the file and click the **X** on the right. Click **OK** to permanently delete the file.

Downloading files

1. Select the folder where the file is saved.
2. Click on the file name.
3. After the file is finished downloading, double click on the download file to open.

Moving files

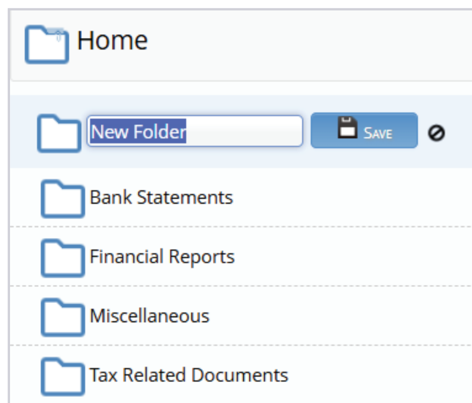
Files should be re-uploaded into the desired folder. If the file is not saved locally and you opt to delete it from the original location, be sure to download it first to save to the new location.

Adding/editing/deleting folders

To add folders:

1. Click the **Add Folder** button.
2. Enter a folder name and click **Save** (see right).
   To cancel, click the icon of a circle with a line through it.

Hint: *Note you can create folders within folders.*

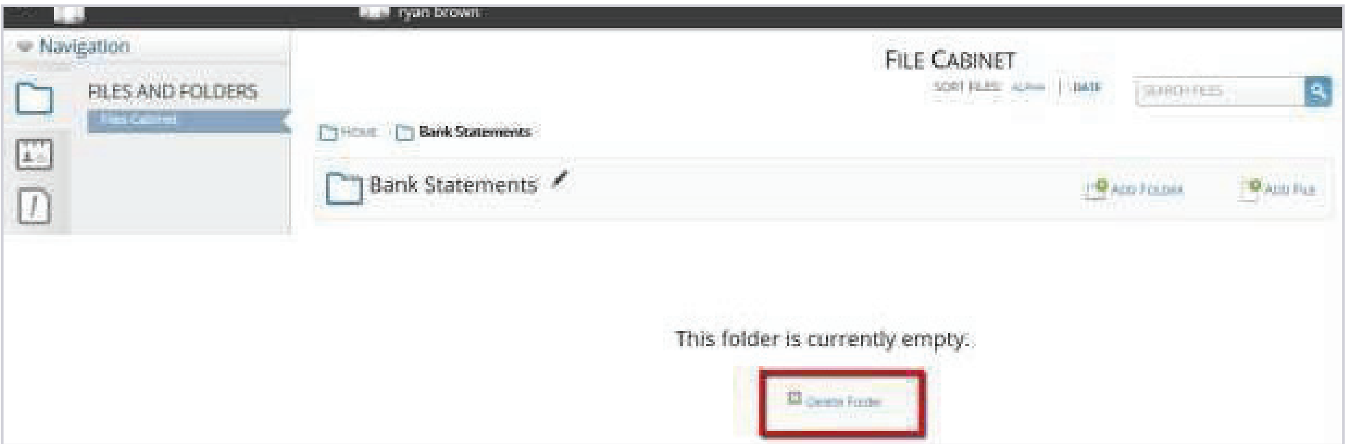


To edit folder names:

1. Click on the folder for which you want to edit the name.
2. Click the **pencil icon**, edit the name, then click **Save**.
   To cancel editing click the icon of a circle with a line through it.

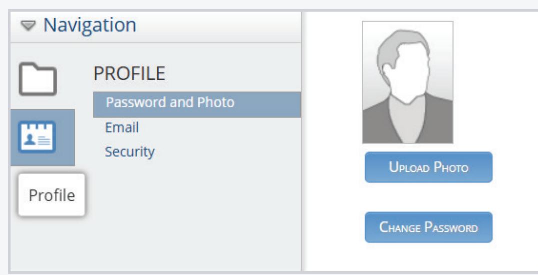
To delete a folder (and all the files within the folder):

1. Click on the folder you want to delete.
2. Click on **Delete Folder** at the bottom of the folder screen (see below). When you delete the folder, you will also delete any files within the folder.



Change password

1. Click the Profile icon in the Navigation menu, then click **Change Password** (see below).
2. Enter your old and new passwords.
3. Click **Change Password**.



Forgot password

1. Go to your Client Xchange sign-in page.
2. Click **Reset password here** and follow the easy instructions.