

# TaxAct Professional Client Xchange User Guide

**For tax year 2015**

V 1.4

Thank you for purchasing Client Xchange, a convenient and secure website portal that enables you and your clients to safely exchange tax information.

Use this guide to help set up your website, invite clients and manage files.

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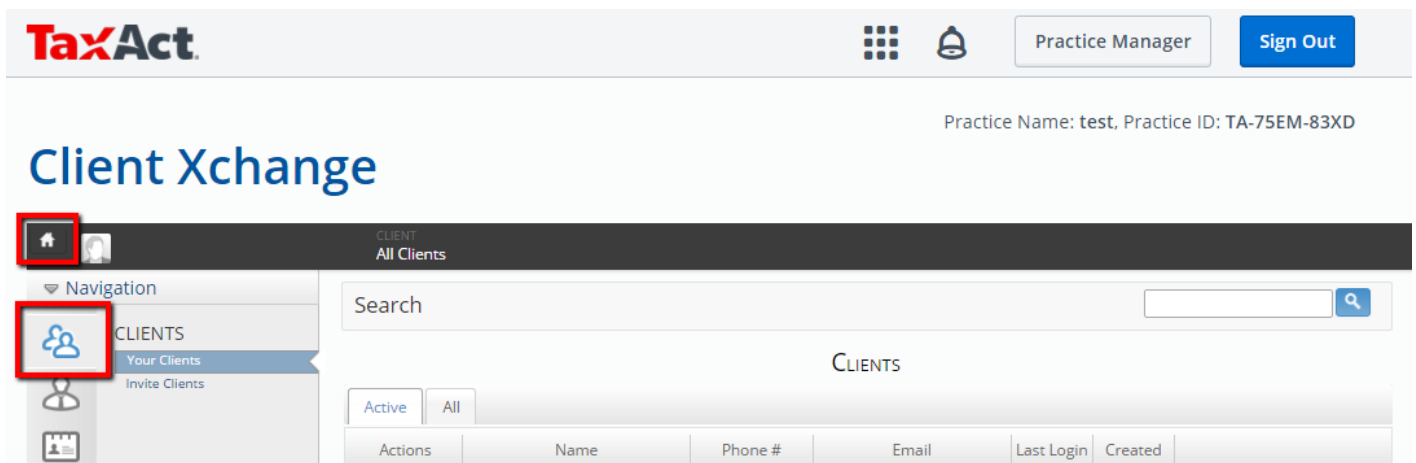
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# 1. Setting up

## Accessing your Client Xchange website

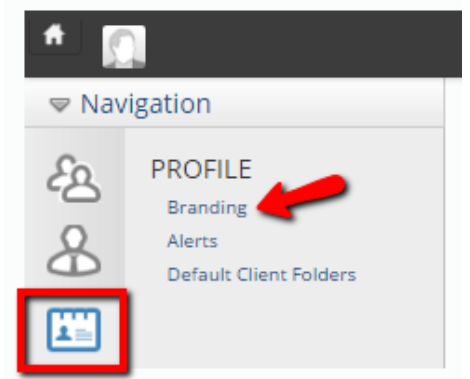
1. Go to [taxactprofessional.com](http://taxactprofessional.com) and click the blue Sign In button in the upper right.
2. Sign in to your secure TaxAct Account.
3. Click the Client Xchange tile on your Practice Manager home page.
4. Your Client Xchange home screen will appear. Your home screen is your client list. To navigate back to this page at any time, click the house in the upper left corner or the first icon for Clients in the Navigation menu (see below).



## Adding/editing your practice name and logo

If you would like your practice name and logo to appear on your website:

1. From your home screen, click the Profile icon in the Navigation menu and select Branding (see right).
2. Enter your or your practice name in "Company Name" (see below).
3. To add a logo, select your logo's dimensions in the drop down. Then click the Upload Logo button and browse to the logo file.
4. Click the Update Profile button to save.



CLIENT  
All Clients

Branding  
Alerts  
Default Client Folders

Company Name  
You or Your Practice Name

Your Title

NOTE: This will be the title your clients will see for you in your profile information. If left blank you will be given a title of Bookkeeper or Advisor. Max characters is 30.

Organization Disclaimer  
If text is entered here, at login users will need to click "accept" after reading the disclaimer to enter the site.

Are the clients required to see the disclaimer at each login? If this is not checked and there is text in the disclaimer box above, the client will only have to click "accept" once.

Logo Dimensions  
55 by 55

UPDATE PROFILE

Your Client Xchange URL  
<https://www.mytaxdocs.com?o=211>

This is the page URL where your clients sign in to their Client Xchange account. Clients must first activate their account by clicking on the link in your invitation email.

Company Logo

CHANGE

If you don't upload a logo, the logo at right will appear by default on your website (it cannot be removed).



### Your website URL

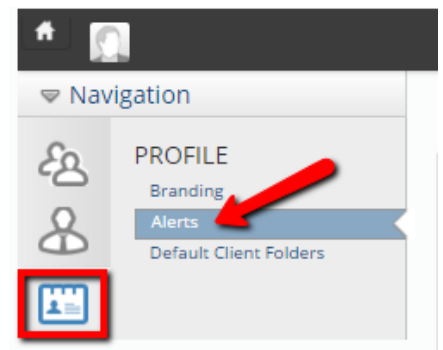
The Branding page of your Profile also provides the URL (begins with <https://www.mytaxdocs.com> in above screenshot) for your Client Xchange website where your clients sign in to their Client Xchange account. You can add this link to your practice's website and email this URL to clients if they didn't bookmark the sign in page when they activated their account.



### Enabling/disabling email notifications

In order to receive an email when a client uploads a file, you must enable email notifications. (Notification emails are turned off by default.)

To enable or disable notifications:

1. From your home screen, click the Profile icon in the Navigation menu and select Alerts (see right).
2. Click the On/Off toggle to enable or disable.
3. Click the Save button.




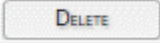
On this screen, you can also manage email address(es) at which you want to receive notifications whenever clients upload a file on this screen. Click  to add or  to delete

Your clients' accounts will be set to receive email notifications when you upload a file by default. The email will include your or your practice's name, the file name, and the folder in which the file was uploaded.

### Creating/editing default client folders

The following four folders will be automatically created for each client unless you modify the default folders: Bank Statements, Financial Reports, Miscellaneous and Tax Related Documents.

To edit the default folders:

1. From your home screen, click the Profile icon in the Navigation menu and select Default Client Folders.
2. To add a new default folder, click , or click  to remove an existing folder.


Changes to client default folders will only apply to new client accounts. The folders for existing client accounts will not change.

## 2. Creating accounts for other professionals in your practice and for your clients

### Inviting other professionals in your practice

After the practice owner has purchased Client Xchange, any professionals who have joined the practice's TaxAct Professional Account will automatically have access. They simply need to sign in to their secure TaxAct Account at [taxactprofessional.com](https://taxactprofessional.com) and click the Client Xchange tile on their Practice Manager home page.

To invite a professional to join your practice by creating a TaxAct Professional Account (so they can access Client Xchange):

1. Go to [taxactprofessional.com](https://taxactprofessional.com) and click the blue Sign In button in the upper right.
2. Sign in to your secure TaxAct Account.
3. Click the Practice Administration tile on your Practice Manager home page.
4. Click Preparer Invitation. Complete the email form and click .



After the invited professionals have joined your practice (by creating a TaxAct Account through the link in the invitation email), they can access Client Xchange by clicking on the tile on their Practice Manager home page.

## Assigning clients to professionals


If multiple professionals in your office have Client Xchange accounts, only the practice owner (aka professional who purchased Client Xchange) can view and access all clients. Professionals in your practice will only be able to view and access client accounts that have been assigned to him/her by the practice owner.

Similarly, only the preparer assigned to that client will receive an email notification when a client uploads a file.

To assign clients to a preparer:

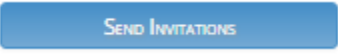
1. From your home screen, click the Preparer icon in the Navigation menu and select Assign Clients to Preparers.
2. Select the preparer in the drop down.
3. Select the client and click  to move to the "Clients Assigned" column.
4. Click .

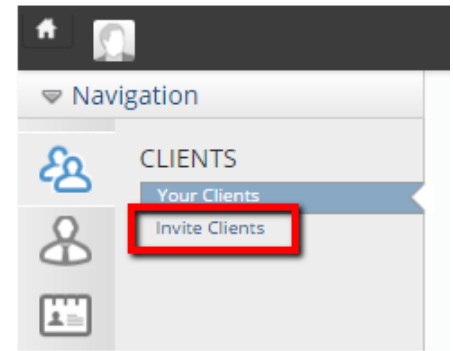
To reassign clients to a different preparer:

1. From your home screen, click the Preparer icon in the Navigation menu and select Assign Clients to Preparers.
2. Select the current preparer in the drop down.
3. Select the client and click  to move to the "All Clients in Organization" column.
4. Follow steps 2-4 in the above section to assign the client to a different preparer.

## Inviting clients

To create a client account and invite a client:

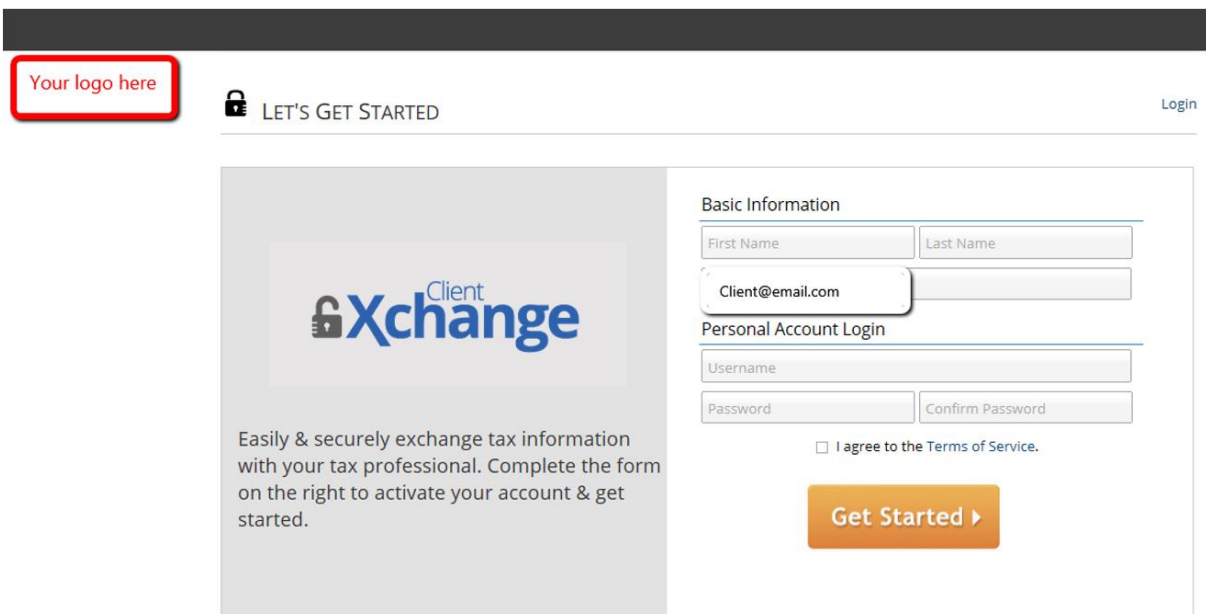
1. From your home screen, click Invite Clients (see right).
2. In the pop-up window with the email invitation, enter your client's email address. Edit the subject line or body text if you'd like.
3. Click  to send the email. If successfully sent, **Invitation emails sent successfully.** will appear at the bottom of the window.



**\*\*\*Each client must be sent an email invitation.\*\*\***

After clients click on the activation link, they need to enter name, username and password (see screenshot below). They can then start uploading and downloading files immediately.

**Important:** Clients must click on the link in their invitation email in order to activate their accounts. (You cannot activate accounts for them.). The activation link is unique to that client for security purposes.

A screenshot of a web registration form for 'Client Xchange'. At the top left, there is a placeholder for a logo labeled 'Your logo here'. The main header says 'LET'S GET STARTED' with a lock icon, and 'Login' is on the top right. The form is divided into two main sections. The left section features the 'Client Xchange' logo and the text: 'Easily & securely exchange tax information with your tax professional. Complete the form on the right to activate your account & get started.' The right section is titled 'Basic Information' and contains several input fields: 'First Name', 'Last Name', and 'Client@email.com'. Below this is a 'Personal Account Login' section with fields for 'Username', 'Password', and 'Confirm Password'. A checkbox labeled 'I agree to the Terms of Service.' is located below the password fields. At the bottom right of the form is an orange 'Get Started' button with a right-pointing arrow.

**Hint:** What you see in a client's File Cabinet is identical to what your client sees, so that you can easily help clients navigate their accounts if needed. (Clients can only see their own File Cabinet, not your home screen or other clients' File Cabinets.)




**If you use TaxAct Enterprise Editions AND network online** (your data is saved on TaxAct's secure servers):

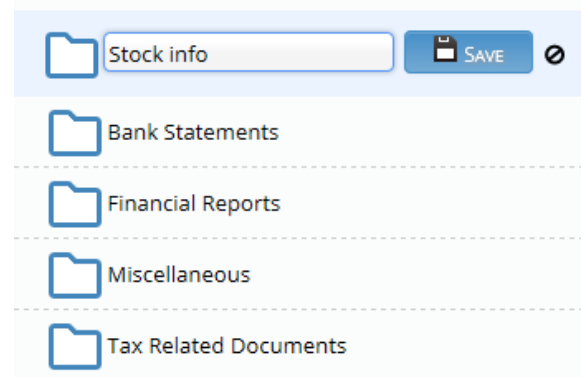
- We'll automatically import your Client Manager list into Client Xchange. To send an invitation email, go to your home screen and click the "Invite" button next to a client.
- Do NOT upload files until a client's account has been activated i.e., client created a username and password. Client accounts that have been activated will appear on the "Active" tab on your client list. Files uploaded before accounts are activated aren't visible to clients.

### 3. Managing folders and files

#### Adding/editing/deleting folders





To add folders:

1. Go to your client list and click  next to the client.
2. You'll see the client's Filing Cabinet of folders. Click .
3. Enter a folder name and click Save (see right). (To cancel, click .)




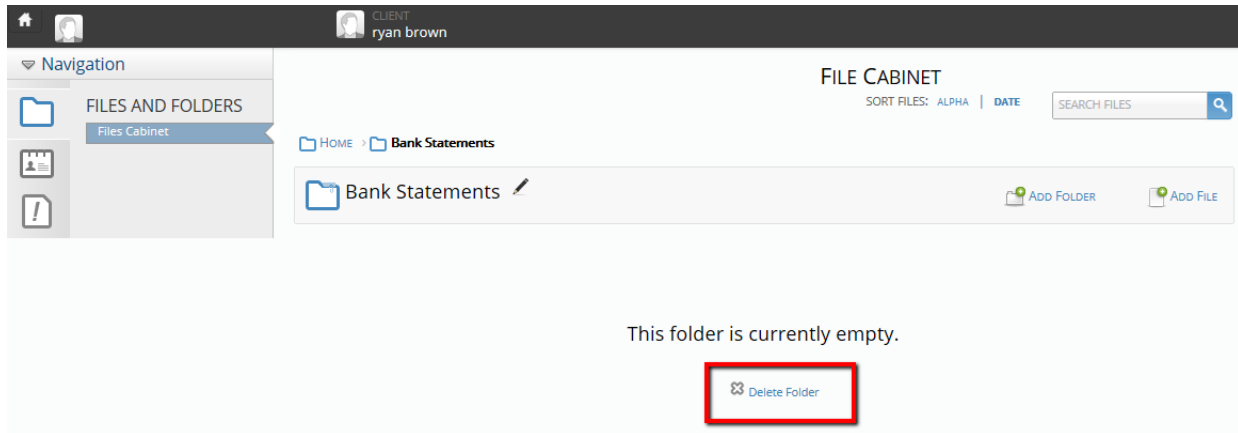
**Hint:** Note you can create folders within folders.

To edit folder names:

1. Go to your client list and click  next to the client.
2. Click on the folder for which you want to edit the name.
3. Click , edit the name, then click . (To cancel editing, click .)

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

1. Go to your client list and click  next to the client.
2. Click on the folder you want to delete.
3. 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.


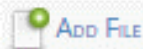


## Uploading/editing/deleting files

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

- Forms received such as W-2s, 1099s, 1098s (electronic file or photo)
- Client organizers, instruction letters, forms for signature, invoices
- .csv files of stock transactions (that can be imported into TaxAct Preparer’s Editions)
- Microsoft Office (Word, Excel, etc.) files
- PDFs of final tax returns (print returns from TaxAct Preparer’s Editions as a PDF)
- Scanned documents





To upload a file:

1. Go to your client list and click  next to the client.
2. Select the folder in which you want to save the file.
3. Click  on the far right.
4. Browse to the file location, select the file, then click Open.



**Note:** If you have a file (such as an informational flyer) that you want to upload to multiple client accounts, you will need to upload the file to each client account.




To edit a file name:

1. Go to your client list and click  next to the client.
2. Select the folder where the file is saved.
3. Locate the file and click  on the right.
4. Edit the file name and click . (To cancel editing, click .) Note: modifying or removing the extension (e.g., .pdf) will NOT change the file type.

To delete a file:

1. Go to your client list and click  next to the client.
2. Select the folder where the file is saved.
3. Locate the file and click  on the right. Click OK to permanently delete the file.

## Downloading files

1. Go to your client list and click  next to the client.
2. Select the folder where the file is saved.
3. Click on the file name.
4. 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.

## 4. Instructions for your clients

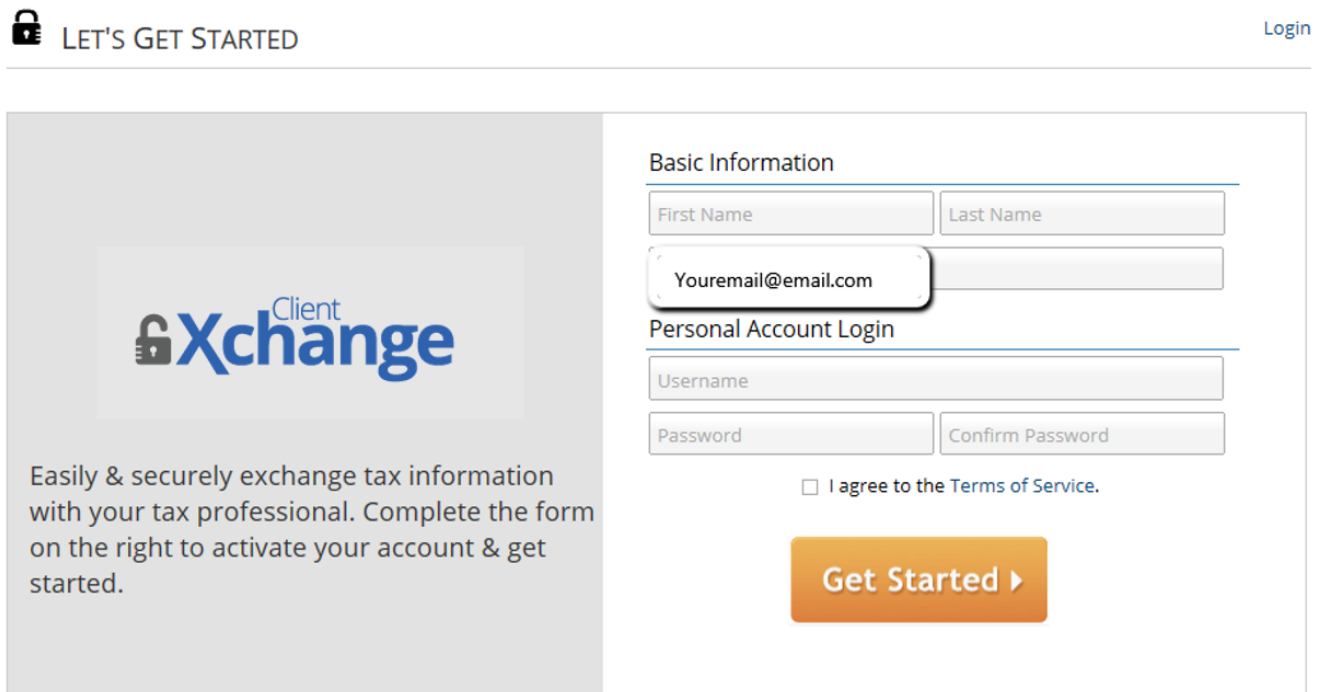
Below are instructions to provide your clients. (Copy and paste into an email or a document printed on your letterhead.)

## Activating your Client Xchange account


You will receive an email invitation from [noreply@mytaxdocs.com](mailto: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.

Simply enter your name, a username and a password (see screenshot below) to get started. You can create your security questions and answers now or the next time you sign in.

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



**LET'S GET STARTED** Login



Easily & securely exchange tax information with your tax professional. Complete the form on the right to activate your account & get started.

**Basic Information**

First Name  Last Name

Email

**Personal Account Login**

Username

Password  Confirm Password

I agree to the [Terms of Service](#).

**Get Started** ▶

After your account is activated, you can start uploading and downloading files immediately.

You will receive an email from [noreply@mytaxdocs.com](mailto: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.

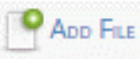
If you need assistance, please contact me directly (do not reply to your invitation email, as it is a no reply address).

## Uploading/editing/deleting files




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

- Tax forms you've received such as Forms W-2, 1099 and 1098
- Microsoft Office files (Word, Excel, etc.)
- .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  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  on the right.
3. Edit the file name and click . (To cancel editing, click .) 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  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

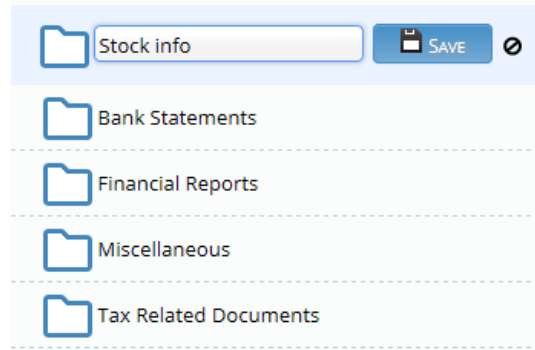
Files should be re-uploaded into the desired folder. If the file is not saved locally and you opt to delete it from the original location, be sure to download it first to save to the new location.

## Adding/editing/deleting folders




### To add a folder:

1. Click  **ADD FOLDER**.
2. Enter a folder name and click Save (see right).  
(To cancel, click .)

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

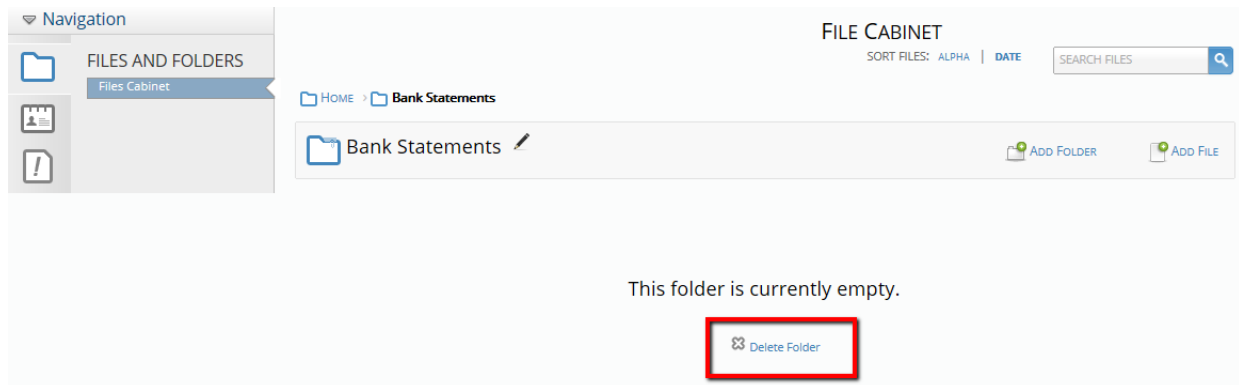


### To edit a folder name:

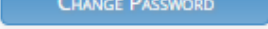
1. Click on the folder for which you want to edit the name.
2. Click , edit the name, then click . (To cancel editing, click .)

### 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

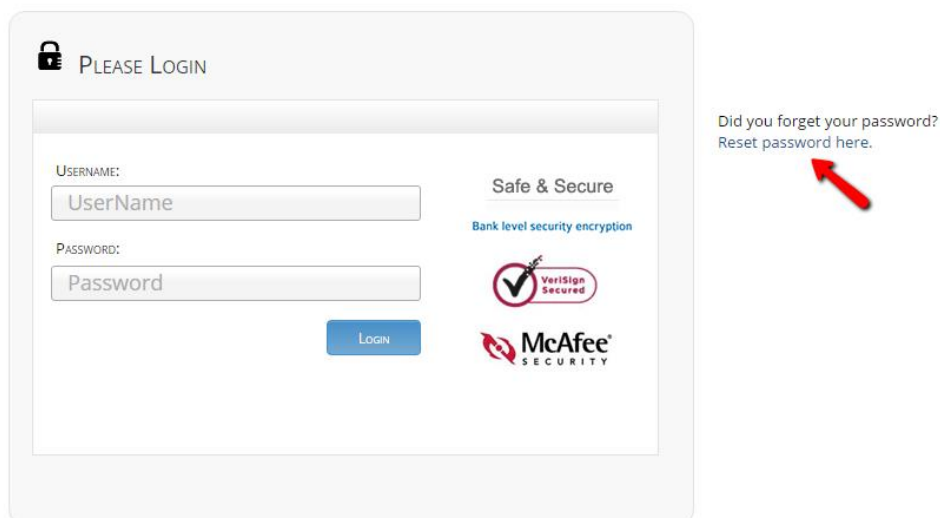
1. Click the Profile icon in the Navigation menu, then click  (see below).



2. Enter your old and new passwords. (If you have not yet created your security questions and answers, you will need to do so now in order to change your password.)
3. Click  .

## Forgot password

1. Go to your Client Xchange sign in page.
2. Click "Reset password here" (see screenshot below) and follow the easy instructions.



## 5. FAQs

### **Can I import my Client Manager list from TaxAct into Client Xchange?**

If you use TaxAct's Enterprise Editions AND use our online networking feature (meaning your data is saved on TaxAct's secure servers), we'll automatically import your Client Manager list into Client Xchange so you don't have to set up any client accounts. If you have more than one preparer in your office, verify that clients are assigned to the correct preparers. (From your home screen, click the Preparer icon in the Navigation menu and select Assign Clients to Preparers to review.)

Reminder: Do NOT upload files until a client's account has been activated i.e., client created a username and password. Client accounts that have been activated will appear on the "Active" tab on your client list. Files uploaded before accounts are activated aren't visible to clients.

If you are not utilizing Enterprise Edition online networking, you cannot import your Client Manager list at this time (we're working on this for tax year 2016).

### **How do I import files from Client Xchange into TaxAct Preparer's Editions?**

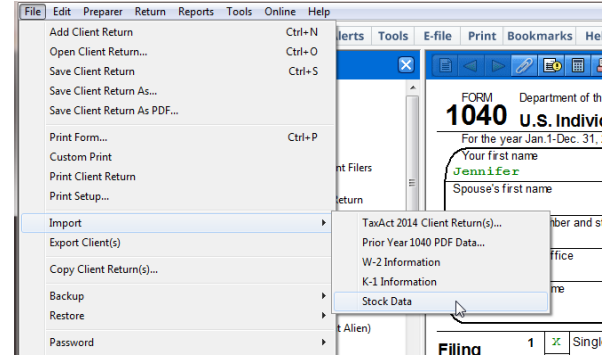
You can import the following file types into TaxAct 2015 Preparer's Editions:

- PDFs of last year's 1040 returns prepared by ATX™, CrossLink®, Drake®, Intuit® Tax Online, Lacerte®, ProSeries®, TaxSlayer Pro™, and TaxWise®
- Comma Separated Values (CSV) file provided by a brokerage or TradeLog®

How to import one of the above files into TaxAct:

1. Download the file by clicking on the file in Client Xchange.
2. Click on the downloaded file and save on your local drive or to your network.
3. Repeat the steps above for each file you want to import.
4. Open the TaxAct program.
  - a. To import PDFs of last year's 1040 returns:
    - i. Click File > Import > Prior Year 1040 PDF Data.
    - ii. Locate the file on your hard drive. Select the PDF files you'd like to import.
    - iii. Use the "Select All" button to import all of last year's returns.
    - iv. Click Import. The client's Basic Information is shown. Review the information and make any necessary corrections, then click OK. You will receive confirmation when the import process is complete. The return(s) will appear in Client Manager with a status of "Imported."

- b. To import a CSV file of transactions:
  - i. Open the client's return.
  - ii. Click File > Import > Stock Data (see right).
  - iii. Click the blue CSV Import button.
  - iv. Browse to your saved file, then click Open.
  - v. Use the drop down menus to match the column headings from your file to the appropriate column headings allowed in the program, then click Next.
  - vi. Select any entries you want imported into your tax file. Note: To select all of the transactions, use the checkbox next to the Import column heading. Click Next to continue.
  - vii. Review the transaction information on the screen. If everything is correct, click Import. If you need to make changes, click Previous to repeat prior CSV import steps.
  - viii. Close the Import Successful notification window.
  - ix. When you return to the CSV File Import screen, click Continue to review, modify, or delete any of the Form 1099-B data imported into your return.



*If you import more than one .CSV file or brokerage statement, the transactions will be added to the list of Form 1099-Bs previously created (up to 2,000 total).*

### **How long will my practice and my clients have access to Client Xchange?**

You and your clients will have access to their accounts for all of tax year 2015 through October 31, 2016.

If you decide to renew your use of Client Xchange at any point before or during tax year 2016, all of your and your clients' files will remain as is.

### **Can I reset a client's password?**

For security purposes, only a client can reset his/her password. If a client cannot remember his/her password, simply create another account for him or her and send an invitation email. The client's new username will need to be different than the original username.

## Can I disable or delete a client account?

We will be adding the ability to disable client accounts in a future product release. In the meantime, you can delete all or some of the files from your client's account. (Reminder: if you want copies of the files, you must download and save the files before deleting.)

## I need help / I have questions. Where can I find answers?

TaxAct's dedicated Professional Support Team is here for you every step of the way.

- **TaxAct's Online Help Center:** Get immediate answers to common questions at [taxactprofessional.com/support](http://taxactprofessional.com/support)
- **Email:** Can't find the answer? Email your question. Go to [taxactprofessional.com/support](http://taxactprofessional.com/support) and click **Email Us**
- **Phone:** New for 2015! Dedicated tax, technical, & customer service help via phone. Call 319-731-2682 during business hours:

	<b>Tax Season</b>	<b>Off Season</b>
Monday – Friday	7:30 a.m. – 7:30 p.m. (CT)	8 a.m. – 5 p.m.
Saturday	9 a.m. – 4 p.m.	Closed
Sunday	11 a.m. – 4 p.m.	Closed