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 .
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