



**TaxAct** Professional

# Client Xchange User Guide

Tax Year 2024    Version 1.0

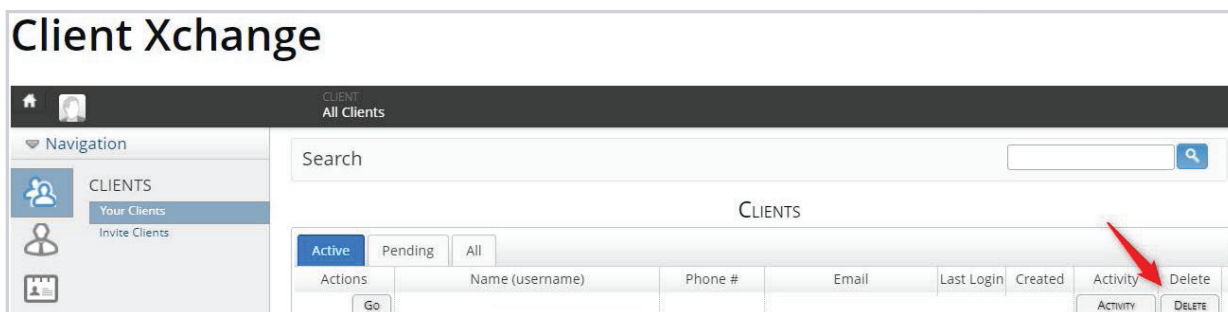
# Table of Contents

<b>1</b>	<b>Setting up</b>	
	Accessing your Client Xchange website .....	3
	Adding/editing your practice name and logo .....	3
	Your website URL .....	4
	Enabling/disabling email notifications .....	4
	Creating/editing default client folders .....	5
<b>2</b>	<b>Creating accounts for other professionals in your practice and for your clients</b>	
	Inviting other professionals in your practice .....	6
	Assigning clients to professionals .....	7
	Inviting clients .....	8
<b>3</b>	<b>Managing folders and files</b>	
	Adding/editing/deleting folders .....	10
	Uploading/editing/deleting files .....	11
	Downloading files .....	12
	Moving files .....	12
<b>4</b>	<b>Instructions for your clients</b>	
	Activating your Client Xchange account .....	13
	Uploading/editing/deleting files .....	14
	Downloading files .....	15
	Moving files .....	15
	Adding/editing/deleting folder .....	15
	Change password/forgot password .....	16
<b>5</b>	<b>FAQs &amp; Support</b>	

# 1. Setting up

## Accessing your Client Xchange website

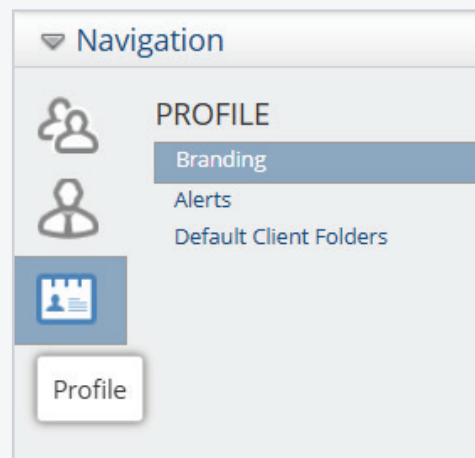
1. Go to [taxact.com/professional](https://taxact.com/professional) and click the **Sign In** button in the upper right.
2. Sign in to your secure TaxAct Account.
3. Click the **Client Xchange** tile on your Practice Manager home page.
4. Your Client Xchange home screen will appear. Your home screen 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.



## 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.

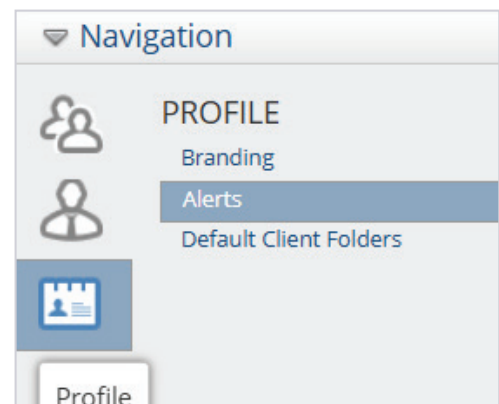
The screenshot shows the 'All Clients' profile page. It includes a sidebar with 'Alerts' and 'Default Client Folders' options. The main content area has several sections: 'Company Name' (text input), 'Your Title' (text input with a note: 'NOTE: This will be the title your clients will see for you in your profile information. If left blank you will be given a title of Bookkeeper or Advisor. Max characters is 30.'), 'Organization Disclaimer' (text area with a note: 'If text is entered here, at login users will need to click "accept" after reading the disclaimer to enter the site.'), a checkbox for 'Are the clients required to see the disclaimer at each login?', 'Logo Dimensions' (dropdown menu set to '200 by 55'), and a blue 'UPDATE PROFILE' button highlighted with a red arrow. Below this is the 'Your Client Xchange URL' section with a text input containing 'https://www.mytaxdocs.com?o=' and a note: '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.' At the bottom is the 'Company Logo' section with a placeholder '{Your Logo Here}' and a 'CHANGE LOGO' button.

## 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 the **Add Email** button to add or the **X button** 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 the **Add Folder** button, or click the **Delete** button 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 the **Send Email** button.

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 the **Add>** button to move to the “Clients Assigned” column.
4. Click the **Save Assignments** button.

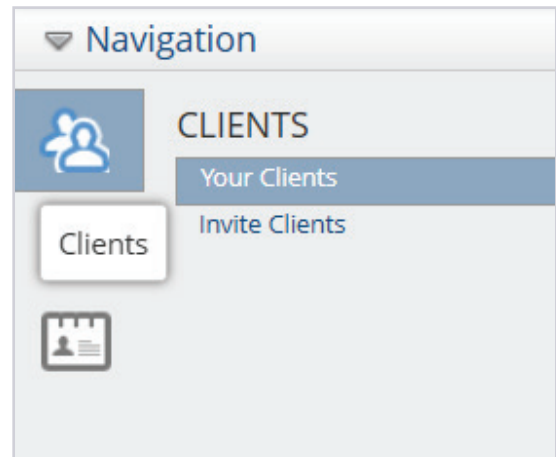
### To reassign clients to a different preparer:

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 the **Remove<** button 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 the **Send Invitation** button to send the email. If successfully sent, **"Invitation emails sent successfully"** will appear at the bottom of the window.



**Hint:** You can invite multiple clients in this invitation window. Separate client email addresses with a semi-colon.

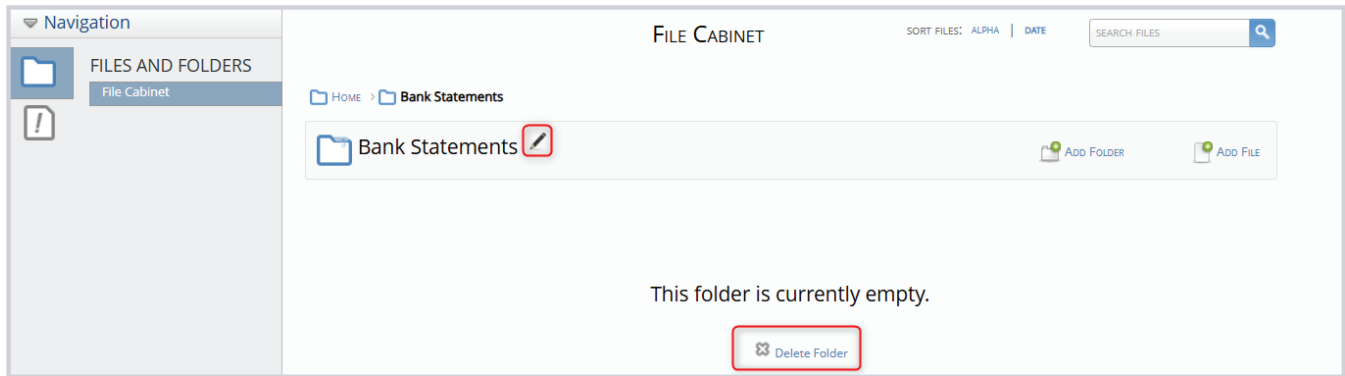
After clients click on the activation link, they need to enter name, username and password (see screenshot below). They can then start uploading and downloading files immediately.

**Important:** Clients must click 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 form titled 'Client Xchange' for creating a new account. The form includes a header with a padlock icon and the text 'Client Xchange'. Below the header, there is a 'Create Account' section with a message: 'Create a new account to complete the invite process.' The form contains four input fields: 'Email Address', 'Username', and 'Password'. The 'Password' field has a visibility toggle icon. Below the password field, there are five validation error messages: 'At least 1 lowercase letter', 'At least 1 uppercase letter', 'At least 1 number', 'At least 1 special character', and 'At least 8 total characters'. At the bottom of the form, there is a checkbox for 'I agree to the Terms of Service and Privacy Policy' and a blue 'CREATE ACCOUNT' button.



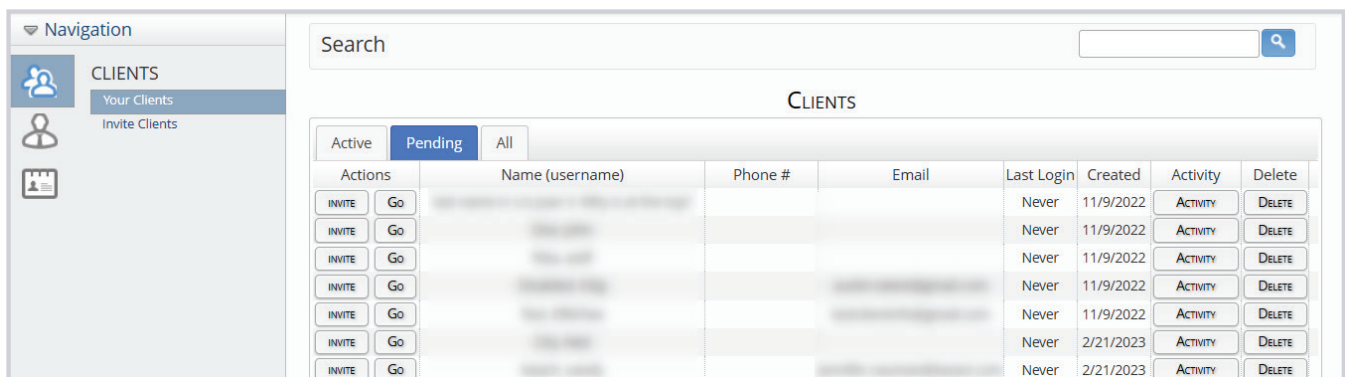
**Hint:** What you see in a client's File Cabinet is identical to what your client sees, so that you can easily help clients navigate their accounts if needed. (Clients can only see their own File Cabinet, not your home screen or other clients' File Cabinets.)



**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. (This invitation window should only be used to invite that particular client. To invite multiple clients who need separate accounts, click **Invite Clients** in the Navigation menu.)

Invited clients will be listed in the "Pending" tab. Clients who have activated their accounts will be listed on the "Active" tab. The "All" tab contains invited, pending and uninvited clients.



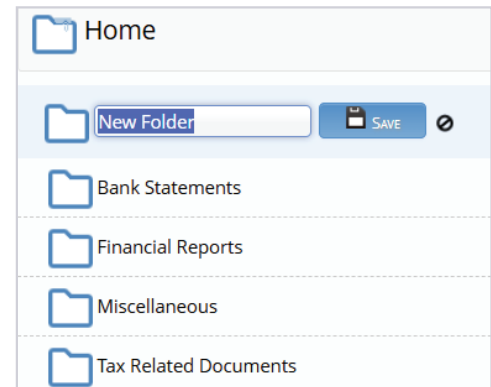
# 3. Managing folders and files

## Adding/editing/deleting folders

### To add folders:

1. Go to your client list and click **Go**, next to the client.
2. You'll see the client's Filing Cabinet of folders. Click the **Add Folder** button.
3. 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.*

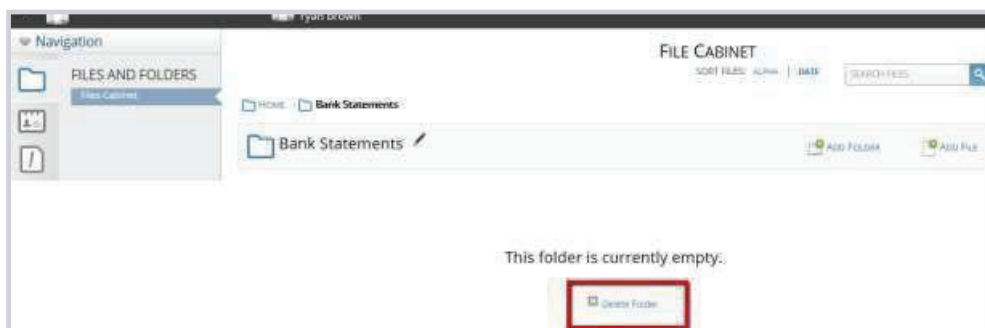


### To edit folder names:

1. Go to your client list and click **Go**, next to the client.
2. Click on the folder for which you want to edit the name.
3. 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. Go to your client list and click **Go**, 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 **Go**, next to the client.
2. Select the folder in which you want to save the file.
3. Click **Add File** 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 **Go**, next to the client.
2. Select the folder where the file is saved.
3. Locate the file and click the **pencil icon** on the right.
4. 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. Go to your client list and click **Go**, next to the client.
2. Select the folder where the file is saved.
3. Locate the file and click the **X** on the right. Click **OK** to permanently delete the file.

### Downloading files

1. Go to your client list and click **Go**, 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

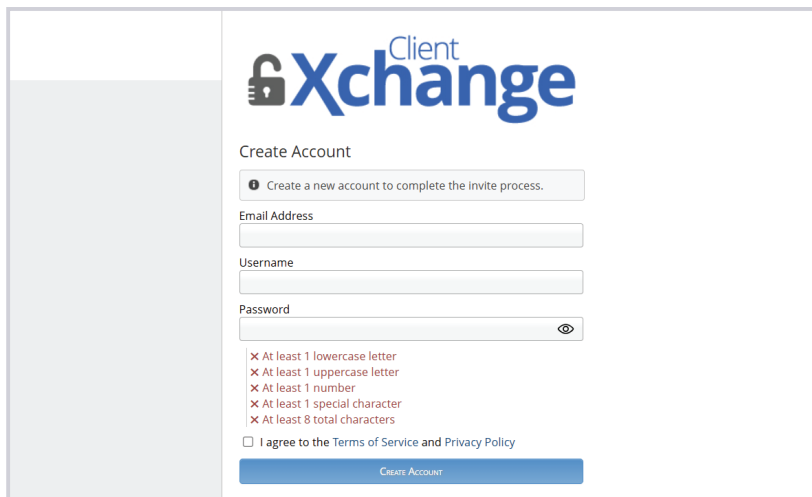
Below are instructions to provide your clients. (Copy and paste into an email or a document printed on your letterhead.)

## Activating your Client Xchange account

You will receive an email invitation from noreply@mytaxdocs.com 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.



The screenshot shows the 'Client Xchange' account creation interface. At the top, there is a logo with a padlock icon and the text 'Client Xchange'. Below the logo, the heading 'Create Account' is followed by a sub-heading: 'Create a new account to complete the invite process.' The form contains four input fields: 'Email Address', 'Username', and 'Password'. The 'Password' field has a visibility toggle (an eye icon). Below the password field, there are five validation criteria, each with a red 'x' icon: 'At least 1 lowercase letter', 'At least 1 uppercase letter', 'At least 1 number', 'At least 1 special character', and 'At least 8 total characters'. At the bottom of the form, there is a checkbox labeled 'I agree to the Terms of Service and Privacy Policy' and a blue button labeled 'CREATE ACCOUNT'.

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

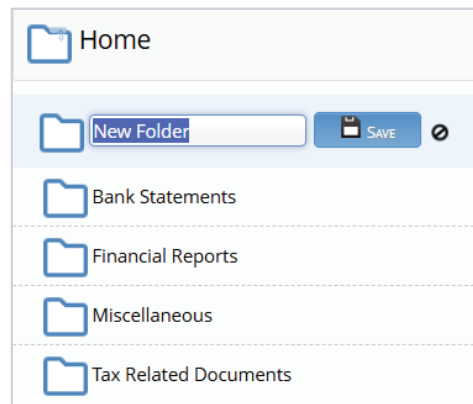
Files should be re-uploaded into the desired folder. If the file is not saved locally and you opt to delete it from the original location, be sure to download it first to save to the new location.

## 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.*

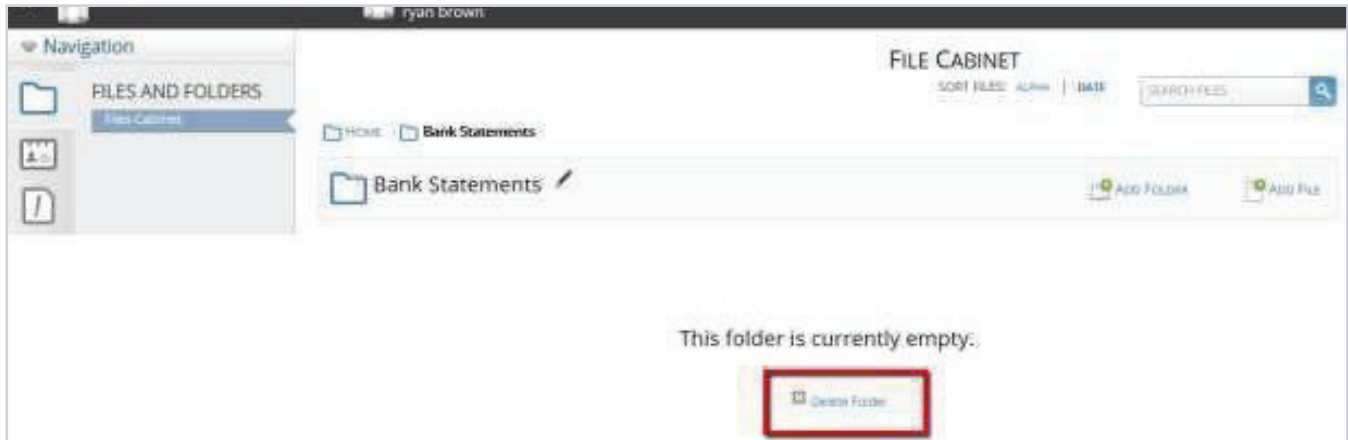


### To edit folder names:

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.

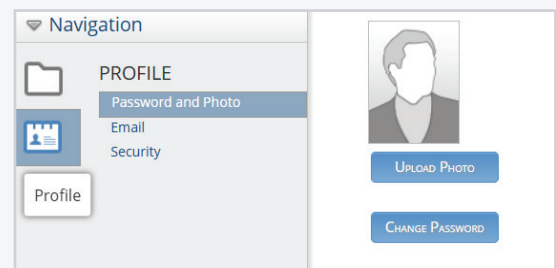
**To delete a folder** (and all the files within the folder):

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.



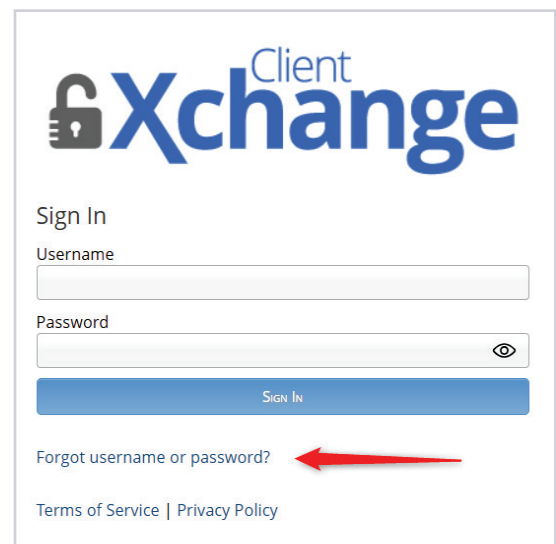
## Change password

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.





# 5. FAQs

## How do I import files from Client Xchange into TaxAct Professional Editions?

You can import the following file types into TaxAct 2022 Professional Editions:

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

How to import one of the above files into TaxAct:

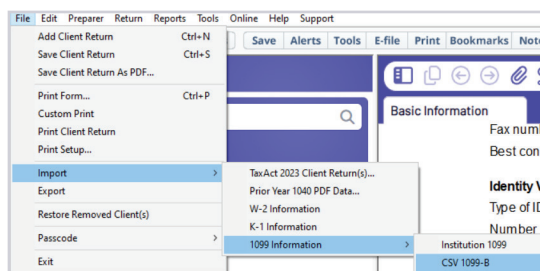
1. Download the file by clicking on the file in Client Xchange.
2. Click on the downloaded file and save on your local drive or to your network.
3. Repeat the steps above for each file you want to import.
4. Open the TaxAct program.

### To import PDFs of last year's 1040 returns:

- Click **File > Import > Prior Year 1040 PDF Data**.
- Locate the file on your hard drive. Select the PDF files you'd like to import.
- Use the **Select All** button to import all of last year's returns.
- 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."

### To import a CSV file of transactions:

- Open the client's return.
- Click **File > Import > Stock Data** (see right).
- Click the blue **CSV Import** button.
- Browse to your saved file, then click **Open**.
- 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**.



- 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.*
- 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.
- Close the Import Successful notification window.
- 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).*

## 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., the 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).

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

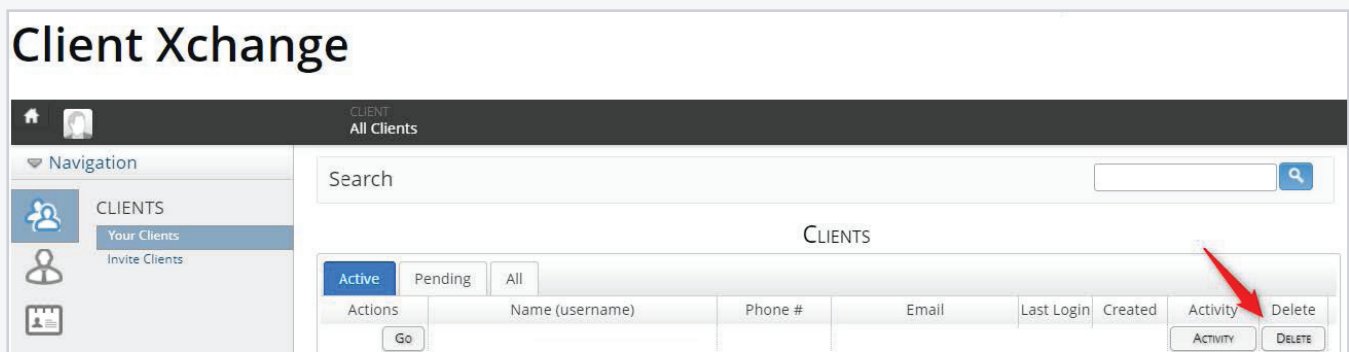
You and your clients will have access to their accounts for all of tax year 2022 through October 31, 2023. If you decide to renew your use of Client Xchange at any point before or during tax year 2022, all of your and your clients' files will remain as is.

## 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?

Clients and their files can be permanently deleted by clicking the **DELETE** button on the client list. **Reminder:** if you want copies of the files, you must download and save the files before deleting.



The screenshot shows the 'Client Xchange' interface. On the left is a navigation menu with 'CLIENTS' selected. The main area displays a search bar and a table of clients. The table has columns for 'Actions', 'Name (username)', 'Phone #', 'Email', 'Last Login', 'Created', 'Activity', and 'Delete'. A red arrow points to the 'DELETE' button in the 'Delete' column of the table.

Actions	Name (username)	Phone #	Email	Last Login	Created	Activity	Delete
Go						ACTIVITY	DELETE

## 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 Professional Support Options

### Online Support Center

For the fastest answers, search our online [Help Topics](#).

### Account & Software Questions:

✉ [professional@taxactservice.com](mailto:professional@taxactservice.com)

☎ (319) 731-2682 option 1

### Tax Questions:

✉ [protaxhelp@taxact.com](mailto:protaxhelp@taxact.com)

☎ (319) 731-2682 option 2

### Order, Payment & Sales Questions:

📄 [www.taxact.com/professional](http://www.taxact.com/professional)

✉ [prosales@taxact.com](mailto:prosales@taxact.com)

☎ (319) 536-3571

### Support Hours:

Monday – Friday  
8:00 a.m. – 5:00 p.m.

Saturday & Sunday  
Closed

All times are in Central  
time zone

Check our [support page](#)  
for in-season hours

Sales hours:  
Monday – Friday  
8:00 a.m. – 5:00 p.m.