




QUICK START GUIDE FOR CLIENTS

BDO FILE EXCHANGE



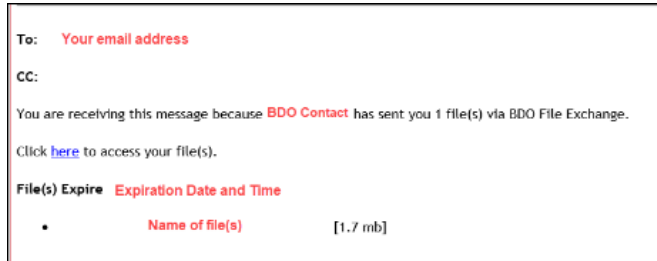
BDO File Exchange is a web-based file transfer solution providing a simple way to transfer files securely between BDO professionals, BDO clients and other non-BDO contacts.



HOW TO ACCESS FILES

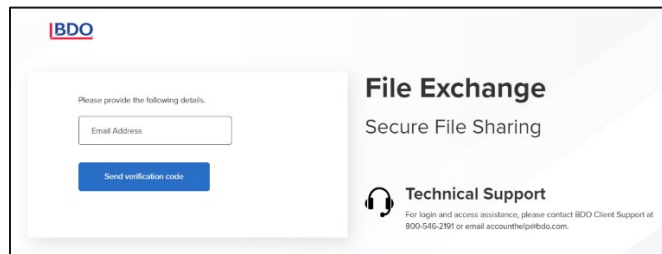
1. BDO File Exchange can be accessed at <https://fileexchange.bdo.com> or via email from your BDO contact containing a link to the file(s) you have been sent.

Select “**CLICK HERE**” in the email to log into File Exchange. The file name(s) will be near the bottom of the message.

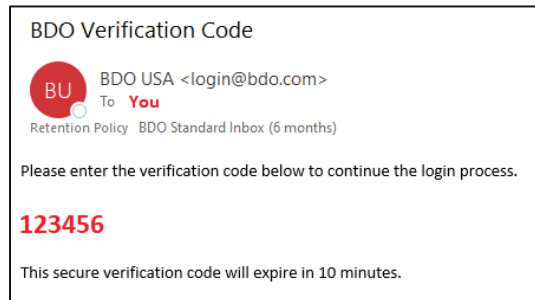


2. Enter your email address on the File Exchange homepage.

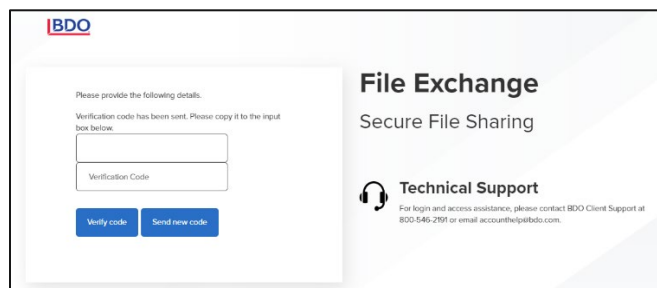
NOTE: Be sure to enter the same email address shown in the “Your email address” section in the image above. Logging in with a different account will not allow you to access your files.



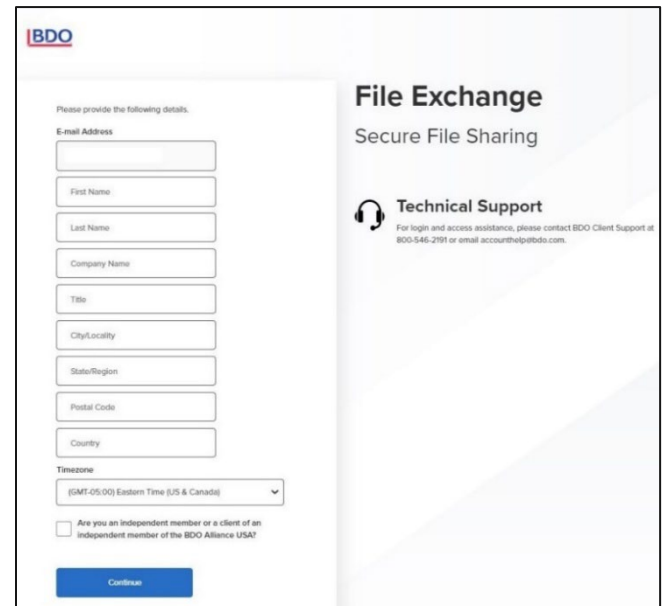
3. A six-digit verification code will be sent from login@bdo.com to your email.



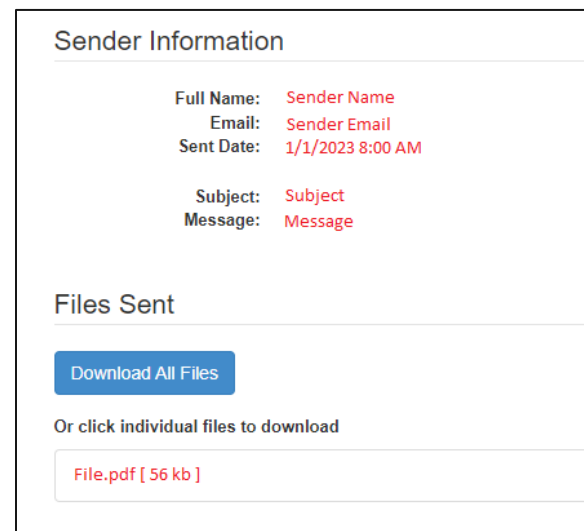
4. Enter the code from the confirmation email into the Verification Code box and select **VERIFY CODE** to proceed.



5. If you have not previously registered your email address with BDO File Exchange, you will be prompted to complete the one-time registration process.



6. After logging in, your message containing the associated files will be viewable.



HOW TO DOWNLOAD FILES

Click each individual file name to download them separately, or all at once by selecting “**Download All Files**”. Using the “**Download All Files**” option will create a .zip file containing all individual files listed.

NOTE: When the recipient has downloaded a file, the sender will receive an email notification.

HOW TO SEND FILES

1. Once you have signed in and registered, **“YOUR INFORMATION”** will automatically populate with your profile name and email.

2. Enter the email address(es) of the recipient(s) in the **“To”** field. If adding several email addresses, separate with a space, comma, or semicolon. Should you need to copy an individual on the email, click **“SHOW CC”** to expand this option.

NOTE: If you add a recipient in error, click the **“X”** next to the name to delete that recipient. You may also copy/paste multiple recipients into the **“To / CC”** fields.

3. Enter your email subject in the **“SUBJECT”** field.

4. Type your message in the **“MESSAGE”** field. This will appear in the body of the email sent to the recipient(s).

5. **SECURE THIS MESSAGE:** When checked, the contents of the message will not appear in the email that is sent but can be securely viewed on the File Exchange site.

The email that is sent notifies the recipient that the content has been hidden and can only be viewed by logging into File Exchange.

6. Select the **“ADD FILES”** button to select the files to send from your computer or drag and drop the files into the box. **Files must be closed first, or they won’t be sent.**

NOTE: If you are using Chrome, you can drag a folder into the box and the contents of the folder will appear, available for upload. Please ensure all files to be uploaded are not open or in use before proceeding to the next step.

7. Select **“UPLOAD & SEND FILES”** to send the message. An **“Upload Complete – All files have been uploaded and sent”** popup message will appear to indicate that the files/ folders were sent. Select OK to close the popup.

NOTE: The recipient receives an email notification with instructions to access the files. Once the recipient has downloaded a file, the sender will receive an email confirmation that it happened.

The screenshot shows the email composition interface with the following sections and callouts:

- 1** Callout to the "Full Name" field in the "Your Information" section.
- 2** Callout to the "To" field in the "Email Content" section.
- 3** Callout to the "Subject" field in the "Email Content" section.
- 4** Callout to the "Message" text area in the "Email Content" section.
- 5** Callout to the "Secure This Message" checkbox in the "Email Content" section.
- 6** Callout to the "ADD FILES" button in the "Files" section.
- 7** Callout to the "UPLOAD & SEND FILES" button in the "Files" section.

The "Files" section includes a table with columns for "Filename", "Size", and "Status", and a message: "Click 'Add Files' to open file explorer or drag files here". The status bar shows "0 b" and "0%".

FAQs

- External users will need to register their email account to access files.
- The email address used to register and log in must match the email address to which the file was sent.
- Messages received from File Exchange cannot be forwarded. Each link is unique to the recipient for security reasons.
- Files may be downloaded up to 14 days after being received. After 14 days, the files will be deleted. Deleted files cannot be recovered by BDO National IT.
- The sender has the option of sending the message content secured.
- Files up to 8GB can be sent.
- To resend an email, the entire file must be re-sent and processed.
- Files may not be sent to email distribution lists; however, they can be sent to a Shared Mailbox.
- Security and technical documentation can be found in the top navigation area of the site.



TECHNICAL SUPPORT

For login and
access assistance,
please contact:

BDO Client Support
800-546-2191
accounthelp@bdo.com

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