

FILE EXCHANGE - Quick Start Guide - For Clients

About File Exchange

BDO File Exchange is a web-based file transfer mechanism that provides a simple way to transfer files securely between BDO employees, BDO clients, and other non-BDO contacts.

Access File Exchange at <https://fileexchange.bdo.com/>

Items to Note:

- External users will need to create an account to access the file.
- You cannot forward the message received from File Exchange. Each link is unique to the recipient for security reasons.
- The body of the email has been hidden for security and may be viewed once logged in to File Exchange.
- Files may be downloaded up to **14 days** after being uploaded to the server. After 14 days, any file that is uploaded will be **automatically deleted**. Deleted files cannot be recovered by BDO IT.
- To resend an email the entire file must be resent and processed.
- Security and Technical documentation can be found in the header of the site.

User Account

You must have a user account to access and use File Exchange. Upon accessing <https://fileexchange.bdo.com/>, you will be presented with two options:

1. Existing user: If you already have an account, select “Login Here”. If you haven’t answered security questions in the past, you may be prompted to answer these questions prior to logging into File Exchange.
2. New User: If you are a New User, you will need to complete the registration form and select “Submit”.

User Guide Technical Documentation Security Documentation

BDO UNITED STATES **FILE EXCHANGE** HOME

WELCOME!

Have an account? [Login Here](#)

Or register below

First Name *

Last Name *

Email Address (username) *

Company *

Password *

Confirm Password *

Submit

Existing User
If you have an account,
login here

New User
Complete the form and
select
"Submit"

Password Policy: Password must match all of the following.

- Min 8 characters
- 1 uppercase character
- 1 special character (!@#%&*()_+|=~{}[]<=>?,./)
- 1 numeric character

Sending Files or Folders

The screenshot shows an email composition interface with three main sections: 'Your Information', 'Email Content', and 'Files'. Red circles with numbers 1 through 8 are placed over various elements to indicate steps in the process.

- 1**: Points to the 'Email' field in the 'Your Information' section.
- 2**: Points to the 'To' field in the 'Email Content' section.
- 3**: Points to the 'Subject' field in the 'Email Content' section.
- 4**: Points to the 'Message' text area in the 'Email Content' section.
- 5**: Points to the 'Secure This Message' checkbox in the 'Email Content' section.
- 6**: Points to the 'ADD FILES' button in the 'Files' section.
- 7**: Points to the 'UPLOAD & SEND FILES' button in the 'Files' section.
- 8**: Points to the 'REMOVE ALL FILES' button in the 'Files' section.

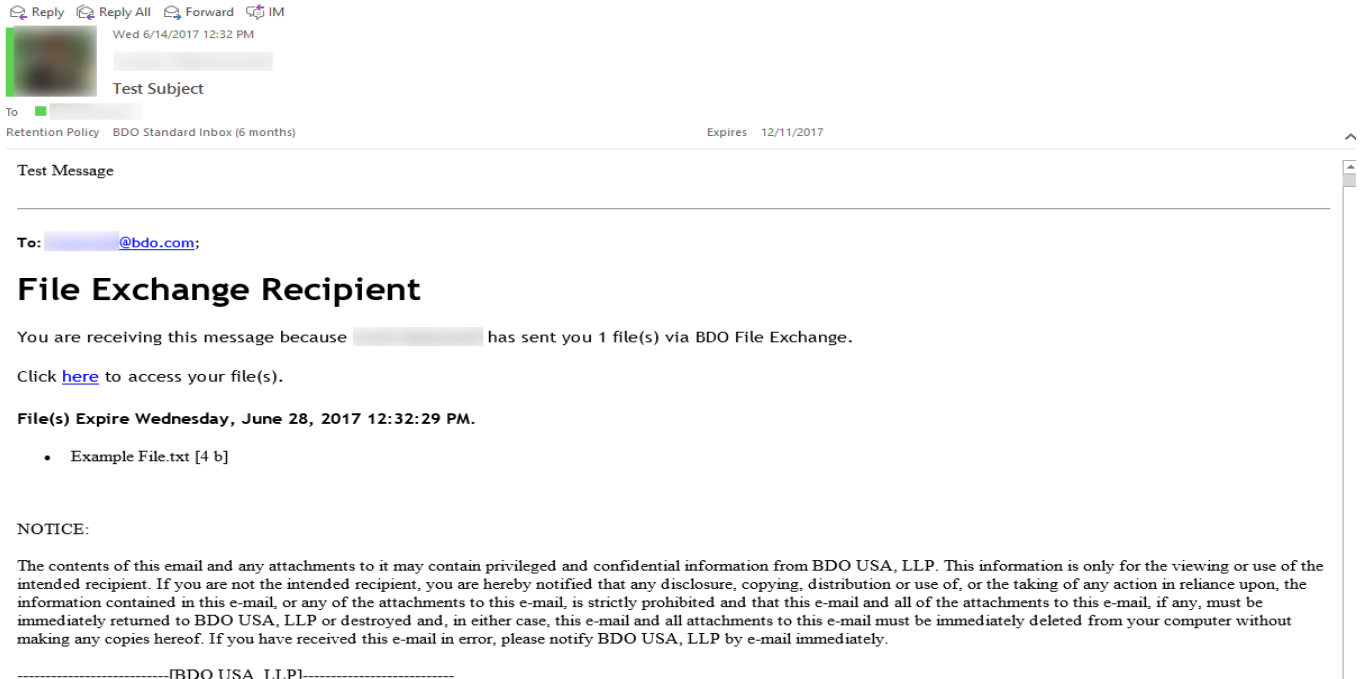
Filename	Size	Status
Example File.txt	4 b	0%

1. Login using your **email address and password**. Once you have signed in, the Your Information section will populate with your profile.
2. Enter the e-mail address of the recipient in the **To** field. Should you need to CC an individual, click **Show CC** to expand this option. Continue adding any additional recipients as needed.
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 a subject line to appear in the email notification to the recipient in the **Subject** box.
4. Type a message in the **Message** box to appear the body of the email that is sent to the recipient
5. Optional feature if sending sensitive information in the message body. 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 content has been hidden and can be viewed by following the link.
6. Click the **ADD FILES** button to select the files to send from your computer, or drag-and-drop the files into the box.
7. Click **UPLOAD & SEND FILES** to send the message. After upload, you will receive an Upload Complete message indicating the files were uploaded and the email was sent.
8. Click **REMOVE ALL FILES** to remove all currently listed files in the uploader. Click the **Minus Sign** “-“ to remove individual files from the uploader.

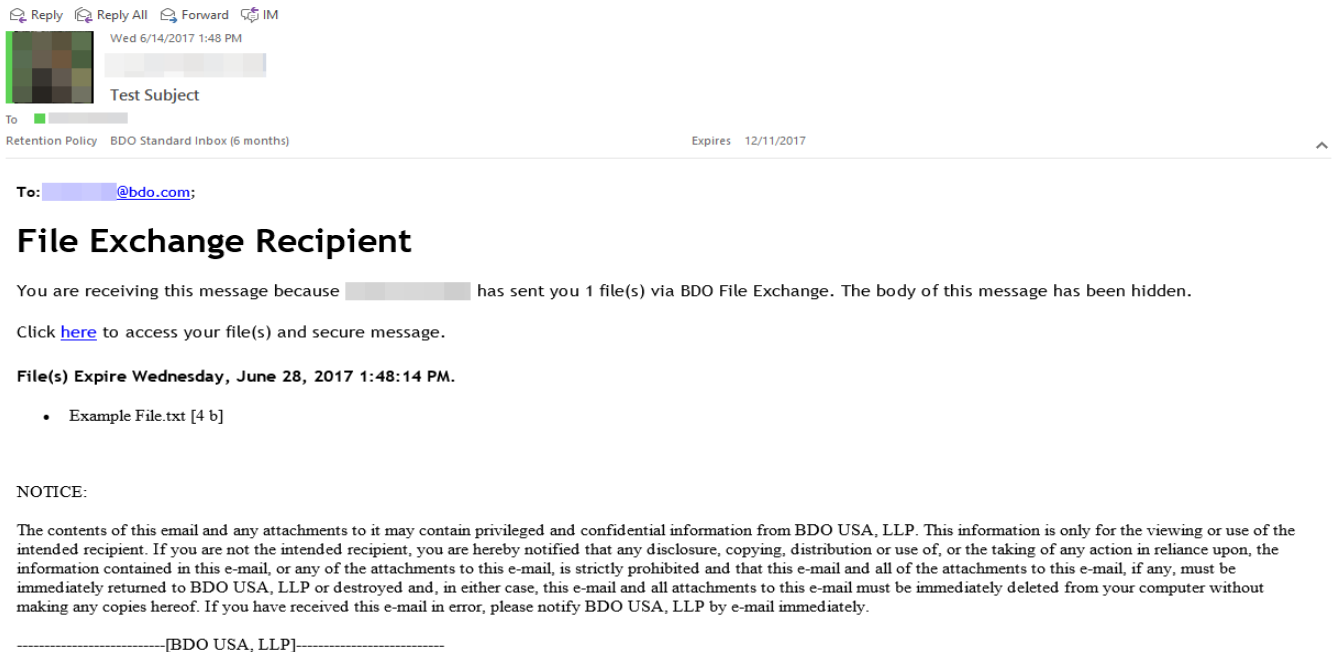
Note: The recipient receives an email notification with instructions to access the files. When the recipient has downloaded a file, you will receive an email confirmation that it happened.

Retrieving Files (Email Address WITH Account)

1. Open the email you received. It will be from the sender of the file and look like a typical email.



2. If you selected “Secure This Message” option from above the email will look like this.



3. Click the “**here**” link in the message.

Note: The message indicates the expiration date; file(s) may not be accessed after this date. It also lists the name and size of each file sent.

4. In the page that comes up, login using your account. This is your email address and password used when you created your account.
 - If you are a New User, complete the registration form.
 - If you already have an account, click Login Here

5. On the next page, click the **Download All Files** button save all files into a Zip folder. Alternatively, click each file(s) to download individually.

Sender Information

Full Name: [REDACTED]
Email: [REDACTED]@bdo.com
Sent Date: 5/24/2017 1:14 PM

Subject: Test FE Email
Message: Test Message

Files Sent

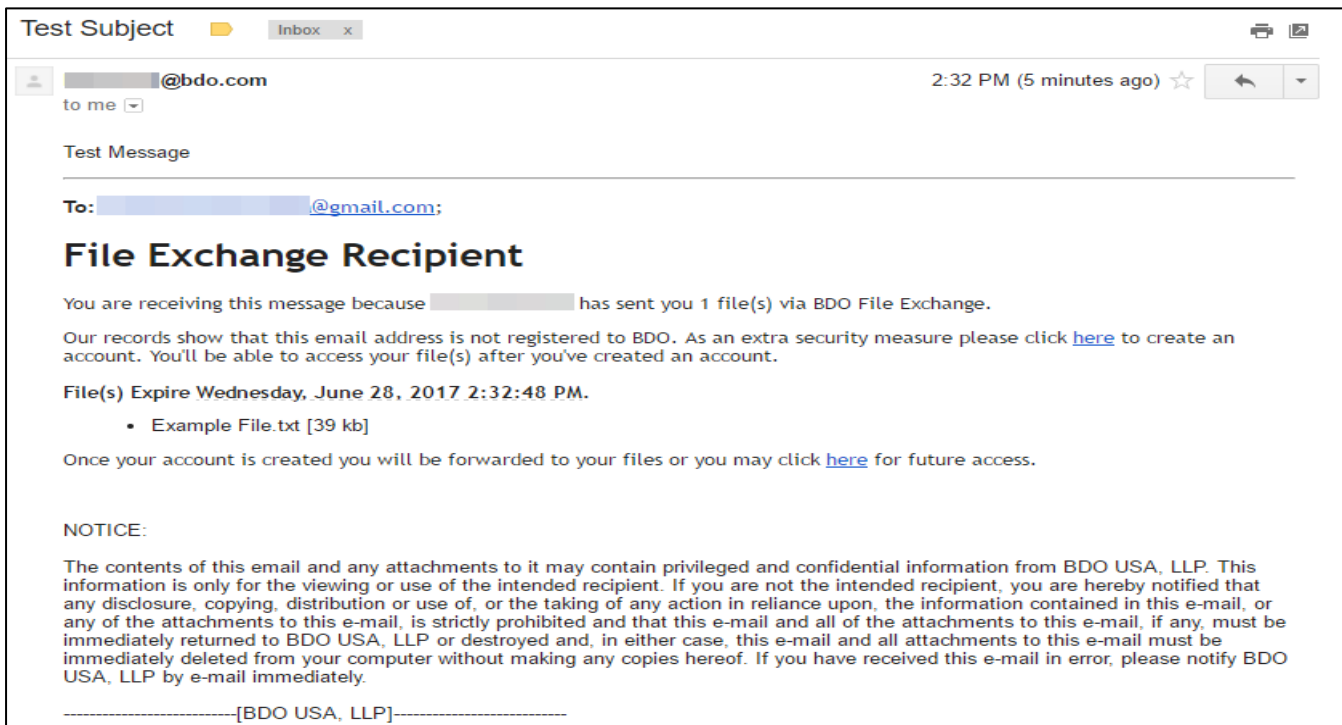
[Download All Files](#)

Or click individual files to download

[File Exchange Test.docx \[11 kb \]](#)

Retrieving Files (Email Address WITHOUT Account)

1. Open the email you received. It will be from the sender of the file and look like a typical email.



2. Click the first "here" link in the message to create an account.
3. This will bring you to the registration page. Complete the form and click **Submit**.
4. After submitting you will be prompted to login with the email address / password you used in step 3.
5. You will be taken to the Downloads page. Click the **Download All Files** button save all files into a Zip folder. Alternatively, click each file(s) to download individually.

