

# BDO FILE EXCHANGE

## QUICK START GUIDE FOR CLIENTS

### ABOUT 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.

Access File Exchange [here](#).

#### Items to Note:

- ✗ As an external user, you will need to create an account to access files. The email address used to create the account needs to 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.
- ✗ You have the option of sending the message content secured.
- ✗ 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.
- ✗ You can send files up to 8GB.
- ✗ To resend an email, the entire file must be resent and processed.
- ✗ Security and technical documentation can be found in the top navigation area of the site.
- ✗ Files may not be sent to email distribution lists, but can be sent to a Shared Mailbox

### USER ACCOUNT

To access and use File Exchange, you must have a user account. Upon accessing <https://fileexchange.bdo.com/>, you will be presented with the option to enter your email address:

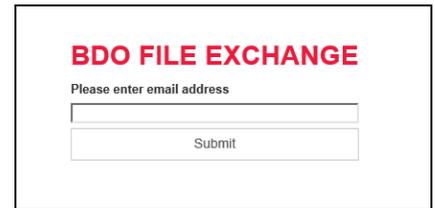
#### 1. You Have an Account:

If you already have an account, enter your email address.

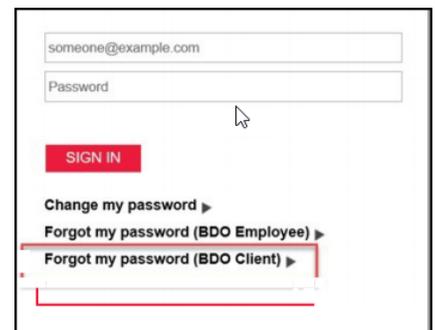
**The email/user name should match the email address to which the file was sent.** If you forgot your password, select “Forgot my password (BDO Client)”, and a new password will be emailed to you. If you haven’t answered security questions in the past, you may be prompted to answer these questions prior to logging in to File Exchange.

#### 2. You Don’t Have an Account

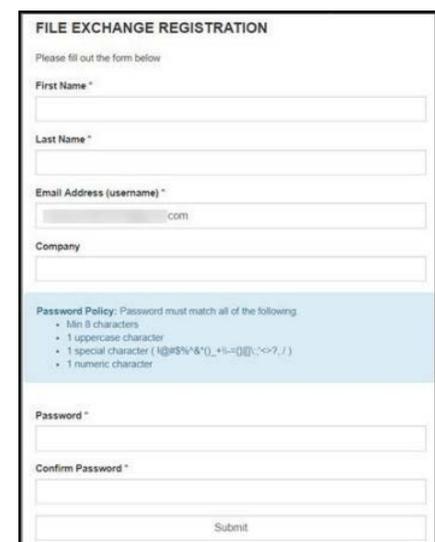
If you are a New User, enter your email address and select “Submit”. You will then be taken to a registration form. The email address should match the email address you will use to send/receive files.



**BDO FILE EXCHANGE**  
Please enter email address  
  
Submit



Password  
  
SIGN IN  
Change my password ▶  
Forgot my password (BDO Employee) ▶  
Forgot my password (BDO Client) ▶



**FILE EXCHANGE REGISTRATION**  
Please fill out the form below  
First Name \*  
  
Last Name \*  
  
Email Address (username) \*  
  
Company  
  
Password Policy: Password must match all of the following  
• Min 8 characters  
• 1 uppercase character  
• 1 special character ( !@#\$%^&\*()\_+!-=[]|{}~<?/, )  
• 1 numeric character  
Password \*  
  
Confirm Password \*  
  
Submit

## HOW TO SEND FILES THROUGH FILE EXCHANGE

1. Once you have signed in and/or registered, the **“Your Information”** section will automatically populate with your profile.
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).

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

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

The **Files** section includes a table with columns for **Filename**, **Size**, and **Status**. The table is currently empty, with a message: **Click 'Add Files' to open file explorer or drag files here**. Below the table are buttons for **ADD FILES**, **UPLOAD & SEND FILES**, and **REMOVE ALL FILES**. The status bar shows **0 b** and **0%**.

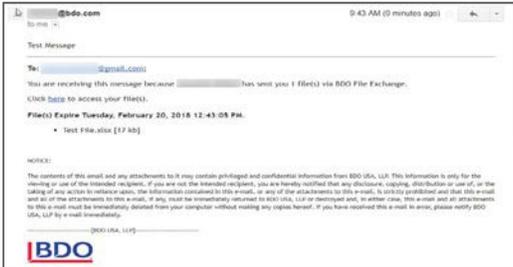
5. **Secure this message:** When checked, the contents of the message will not appear in the email that is sent, but can be securely viewed on the File Exchange site. The email that is sent notifies the recipient content has been hidden and can be viewed by following the link.
6. Click the **“ADD FILES”** button to select the files to send from your computer or drag and drop the files into the box. If you are using Chrome, you can drag a folder into the box and the contents of the folder will appear, available for upload.
7. Click **“UPLOAD & SEND FILES”** to send the message. After upload, you will receive an Upload Complete message indicating the files/folders were sent.

**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.

## HOW TO DOWNLOAD A FILE FROM AN EMAIL NOTIFICATION - WITH AN ACCOUNT

You will receive an email similar to the image below. It will come from the sender of the file and look like a typical email.

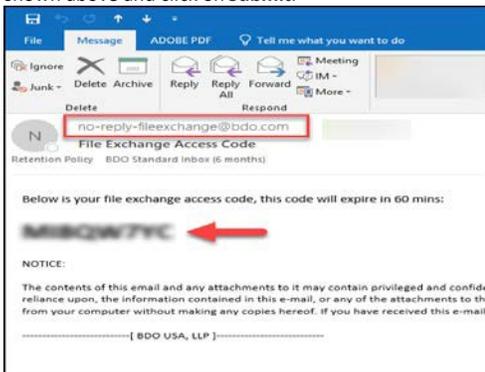
1. Click the **“here”** link in the message to access your file(s) and secure message if applicable. **Note:** The message indicates the expiration date and file(s) may not be accessed after this date. It also lists the name and size of each file sent.



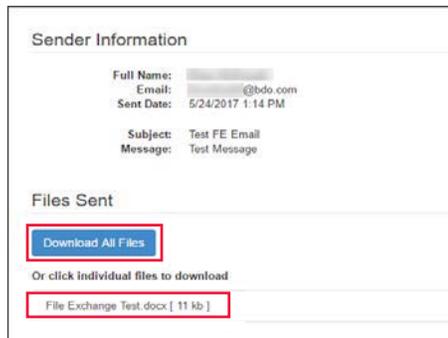
1. After clicking **“here”** the login page will open. **Log in** using your email address and password used when you created your account.
2. You will then be presented with a screen to **“Enter Access Code”**. An access code is now required to download files and will be emailed to you. The code is good for **60 minutes**. If not downloaded within that time, you will need to click to access again to generate a new code.



3. Check your email for an email from **“no-reply-fileexchange@bdo.com”** with subject of **“File Exchange Access Code”**. Enter that code into field shown above and click on **Submit**.



4. Once logged in, click the **“Download All Files”** or click each file to download individually.



## HOW TO DOWNLOAD A FILE FROM AN EMAIL NOTIFICATION - WITHOUT AN ACTIVE ACCOUNT

You will receive an email similar to the format below. It will come from the sender of the file and look like a typical email.

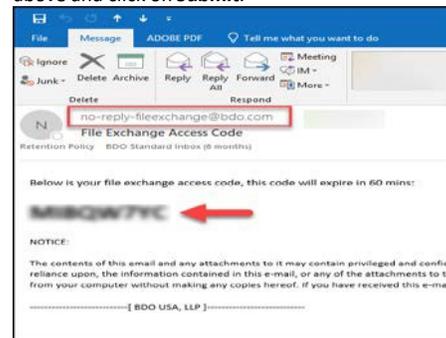
1. Click the first **“here”** link in the message to create an account.



2. This will bring you to the registration page. The email address to which the file was sent will pre-populate into the email address field. Complete the rest of the form and click **“Submit.”**
3. After submitting your information, you will be prompted to log in with the email address / password you used in step 3.
4. You will then be presented with a screen to **“Enter Access Code”**. An access code is now required to download files and will be emailed to you. The code is good for **60 minutes**. If not downloaded within that time, you will need to click to access again to generate a new code.



5. Check your email for an email from **“no-reply-fileexchange@bdo.com”** with subject of **“File Exchange Access Code”**. Enter that code into field shown above and click on **Submit**.



6. You will be taken to the Downloads page. Click **“Download All Files”** or click each file to download individually.

