

How to use File Exchange

- 1. Scan your documents, label them clearly and save them to your desktop or another easy-to-find folder.
- 2. Log into your online account at www.woodburycpas.com and click the 'file exchange' button located above your name on the left-hand side of the screen.



- 5. Either drag and drop your saved files from the desktop into the upload box, or click the 'add files' button to search your computer for the files you saved.
- 6. When all the files you need to upload are shown in the upload box, press 'start upload' to complete the process.
- 7. Your preparer will be automatically notified that you have uploaded files, but feel free to give us a call if you would like to explain anything or if you have any questions.