

# QUICK START GUIDE



TXCPA Exchange is an online member forum that allows you to connect, learn and share with colleagues like never before. We've put together this handy quick start guide to show you the basics and help you get the most out of your new member benefit.



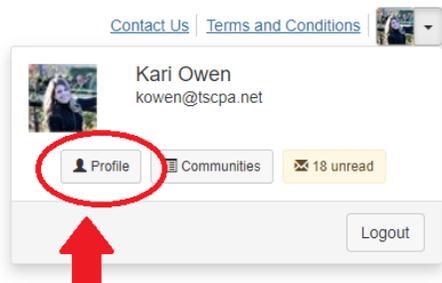
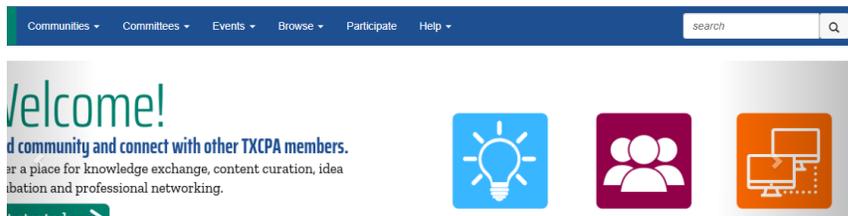
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## Welcome. It's easy to get started.

You can get to TXCPA Exchange by visiting [exchange.tscpa.org](http://exchange.tscpa.org) directly and clicking 'Sign in' at the top right-hand corner of the page.

*NOTE: Because TXCPA Exchange is integrated with our member database, you don't have to remember more than one login or password.*



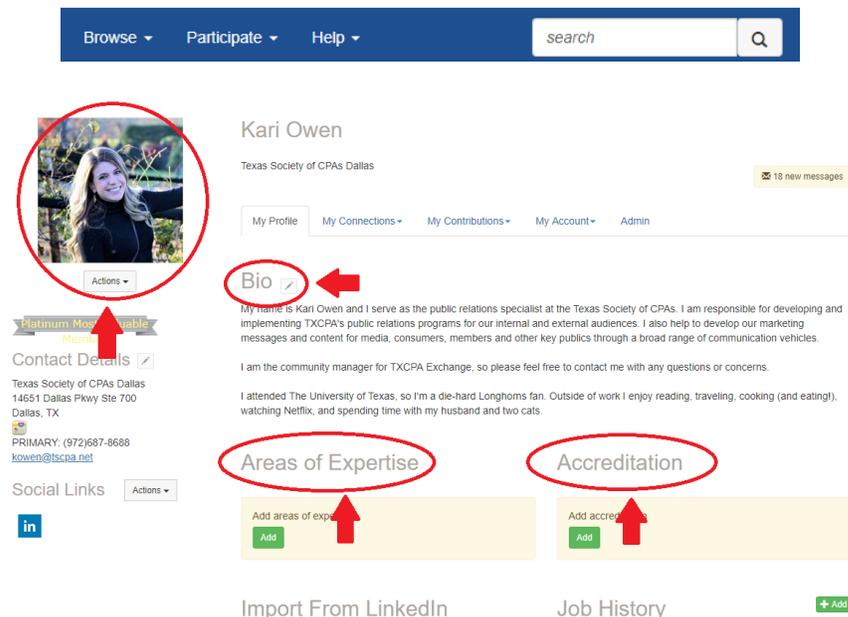
## Profile. Tell us about yourself.

View your profile by clicking the down arrow in the top right corner. Select 'Profile.' We've used your information from our database to complete the basic parts of your new profile, including your name, organization and professional designations.

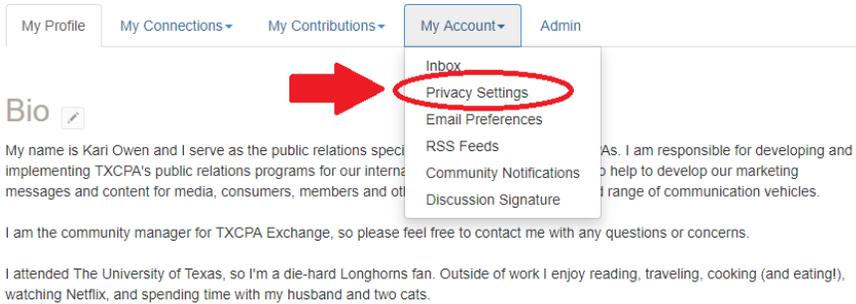
Now make it yours by filling out areas like your bio, education and job history to help other members find you and get conversations started. Update your 'CPE Interests' and 'Areas of Expertise' to personalize your communication from TXCPA.

Don't forget to upload a picture of your smiling self. This really helps add to the community and helps others get to know you.

*NOTE: Want to keep certain aspects of your profile private or visible to your contacts only? Learn how in the next section on 'Privacy Settings.'*



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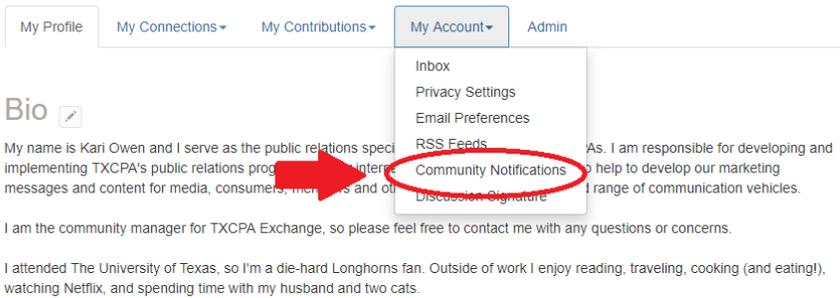


## Privacy Settings. Manage who can view your information.

You can personalize who can see your profile information by going to 'My profile' (upper right hand corner)-> 'My Account'->'Privacy Settings.' You can also switch the slider button to "no" if you do not want to be included in the member directory.

*NOTE: The member directory is only visible to TXCPA members. It can not be accessed or used by people outside the organization.*

## Areas of Expertise Accreditation



## Notification Settings. Personalize your experience.

You can also personalize how often you receive email notifications from the community by going to 'My profile' (upper right hand corner)-> 'My Account'- >'Community Notifications.' Automatically, all members are subscribed to the "Daily Digest" for the "All Member Forum." You can choose how you want your messages from the community to be delivered to you:

## Areas of Expertise Accreditation

### Community Notifications

Community notification will be delivered to your primary address:

kowen@tscpa.net

To receive specific community notifications at an address other than your primary, set override(s) where desired.

#### Daily Consolidated Community Digest:

Deliver to your primary address. [change](#)

#### Weekly Consolidated Community Digest:

Deliver on Sunday to your primary address. [change](#)

#### Discussion Email:

You have no override email addresses for discussion emails. [add override addresses](#)

### Notification Settings

Yes  No Automatically set community discussion emails to "No Email" when a community is added to a consolidated digest.

Community	Discussion Email	Consolidated Daily Digest	Consolidated Weekly Digest
<a href="#">All Member Forum</a>	No Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">CPA Practice Management</a>	No Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">External Relations/Image Issues</a>	No Email	<input type="checkbox"/>	<input type="checkbox"/>

- **Real Time:** sends an email the moment someone posts in the community
- **Daily Digest:** sends an email each morning with the previous day's posts
- **No Emails:** You can read and reply to posts when you are logged in to the community, but you will not receive any email notifications.
- **Consolidated Daily/Weekly Digest:** Receive notifications from all your communities in one consolidated daily or weekly email. You can choose which day you receive the weekly email

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## Peer Search. Make new friends; find old ones.

Look for other members by name, company or email address by using the 'Member Directory' link in the upper navigation. Or dig deeper by using the 'Advanced Search' function to look for people by chapter, accreditation, areas of expertise and more. This is a great way to find members that share profile characteristics with you!

## Member Directory

Once you've found the person(s) that you're looking for, you can view profiles, send messages or add as a contact directly from the search results page.

## Communities. We're starting together.

As you start to look around, you'll probably notice the 'Communities' menu item. All TXCPA members are automatically added to the 'All Member Forum.' We also have separate interest-area communities (i.e. Tax Issues, CPA Practice Management, Nonprofit Accounting) that you can join!

Click 'All Communities' to view the entire selection, or click 'My Communities' to see a list of the communities you're already subscribed to!

## Discuss. Start a conversation; post your thoughts

To start a new discussion in the All Member Forum (or one of your other communities), click 'Participate' -> 'Post a Message' and choose the community from the drop-down list. You can also go to 'Communities' -> 'All Member Forum' (or choose one of your other communities) and add a new discussion post.

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## IRS Courtesy Disconnects

1. IRS Courtesy Disconnects

Josh LeBlanc 13 days ago  
Anyone else had any experience lately that leads you to believe the infamous courtesy disconnects have returned?

Reply to Discussion  
Reply to Sender  
Pin post to top  
Edit  
Remove

## Communicate. Participate in the conversation.

All communities, including the 'All Member Forum,' feature online discussion boards and email forums. Click on a post to read more and see responses in chronological order. You can also use the drop-down list next to posts to:

- **Reply to Discussion:** answer a question, provide feedback, share your thoughts!
- **Reply to Sender:** sends a private response to the author of the post.

Communities ▾ Committees ▾ Member Directory Events ▾ Browse ▾ Participate ▾ Help ▾

Library Entries

Discussion Posts  
Library Entries

Create New Library Entry

## Resource Libraries. Don't reinvent the wheel.

When you're in need of sample documents, industry best practices, comment letters, spreadsheets, Exam study guides or any other variety of tools or templates, start in the Resource Library instead of starting from scratch.

Return the favor by uploading documents of your own, either directly to a community library or by including them in an attachment to your post. They all end up in the same place.

*NOTE: Like what you found? Take the time to comment on the document to help others in the future.*

Events ▾ Browse ▾ Participate ▾ Help ▾

search

Edit Carousel ▾

members. n, idea

## Discovery. Find information quickly and easily.

TSCPA Exchange comes complete with a robust search function that gives you the ability to locate posts and documents that contain exactly what you're looking for. The search function crawls through communities, libraries and member posts to return only the items that match your search criteria. Use the search function in the grey bar to find exactly what you need.