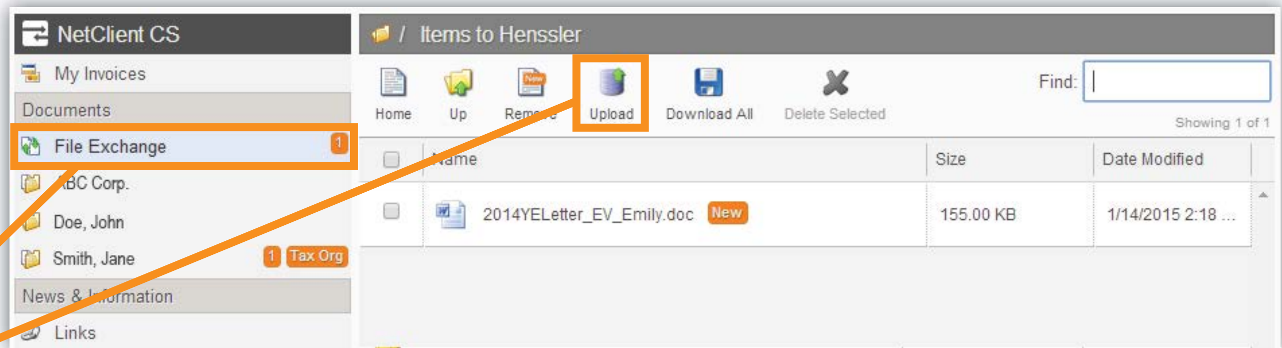
Uploading Documents

There are two ways you can upload documents, both explained below.



File Exchange (Preferred Method)

This method notifies your Tax Consultant automatically when you upload files.

- Click File Exchange in the side menu.
- Click the “Items To Henssler” folder.
- Click the Upload button.
- A prompt will appear.

Add Files

There are two ways to add files:

- Click the “Add Files” button.
- Drag items into the file upload area.

Delete Files from the Upload Area

- You can delete files added to the upload area by clicking the minus sign next to the file name.

Upload Your Files

- Click the Start upload button.
- Once complete, the prompt will go away and your uploaded file will appear in the list.

To access these files in the future:

- In File Exchange, go to the Items to Henssler directory.

Uploading Documents

Home Link
This method notifies your Tax Consultant once you select "Send to Preparer."

Additionally, since you cannot specify a save location with this method, files uploaded this way will be stored in your Documents under the account for Tax Organizer selected.

- On your Tax Portal homepage, click the Upload Tax Documents link.
- Click the Upload button.
- A prompt will appear.
- Adding files, deleting files from the upload area and uploading are identical to the preceding File Exchange method.

Notify Tax Consultant

- Once all files are uploaded, click the Send to Preparer button.

Note: With this method, your Tax Consultant WILL NOT be notified until you click the Send to Preparer button.

To access these files in the future:
There are two ways to access files uploaded this way:

- Click the Upload Tax Documents link on the home page. Then click Uploaded Tax Documents to view a list of your files.
- In Documents, go to the account you uploaded the file to and open the Tax Organizer directory.