

Viewing and downloading File Exchange files:

1. You can view, download, and print files from File Exchange at any time.

Notes

- If you will need to make changes to and/or upload the file back to your portal, you must download the file to your computer before making any changes to it.
- If new files are available in File Exchange, a new indicator appears to the right of the folder and file names. You can remove the indicators by clicking the Remove icon at the top of the File Exchange screen.

To view, download, and print files from File Exchange, follow these steps.

1. In the Documents section of the navigation pane, click the **File Exchange** link.
2. In the File Exchange screen, click the folder that contains the file you want to view. Depending on the folder structure, you may need to open sub-folders to access the file.

Note: If you are unable to find a file within the File Transfers folder, the file transfer location might have expired, which causes NetClient to delete the folder and the files it contains. Refer to the email message that you received from our firm about the file transfer to determine the date on which the location was set to expire.

3. Do one of the following.
 - To view a file in any folder, click the name of the desired file. Depending on how your computer is configured, you will be prompted to either save or open the file.
 - To download multiple files from a folder, including any files in subfolders within the folder, click the Download All button at the top of the File Exchange screen. NetClient creates a ZIP file that you can save to your computer or to a network location.

Tip: If you cannot see files that were uploaded for you, you might need to [delete your temporary internet files or cached files](#).

4. After you open a file, you can print it or download it by choosing Save As from the File menu and navigating to the desired folder.

If you save the file with the same name as the file you downloaded, you will overwrite the original file if you upload it to your portal.

5. If Sign and Reject icons appear to the right of the file in the File Exchange screen, review the file and click the Sign icon to sign the file electronically or click the Reject icon.

Tip: To move backward through the folder structure, click the Up icon. To return to the original view, click the Home icon.

Note: If you need to modify the file and return it to us, you must upload the document to us

Uploading file to File Exchange:

1. You can upload files of up to 2 gigabytes (GB) to File Exchange folders. If you upload multiple files, the size of each file must be 2 GB or less.

Note: You can upload files to File Exchange only if we have given you permission to do so.

2. In the Documents section of the navigation pane, click the File Exchange link.
3. In the File Exchange screen, click the folder to which you will upload the file. Depending on the folder structure, you might need to navigate through sub-folders to access the desired folder.
4. Click the Upload icon.
 - a. Do one of the following.
 - i. Click the Add files button, navigate to the files you want to upload, select them, and click the Open button.
 - ii. If your internet browser supports HTML 5, the words "Drag files here" appear in the upload section. You can upload files by opening Windows Explorer, navigating to the files you want to upload, selecting the files, and dragging the files to the file list.

Note: You can upload multiple files of up to 2 gigabytes (GB), and you can include multiple files in a single upload.

5. Click the Start upload button.
6. If you uploaded all requested files to a folder within the File Transfers folder, click the Complete File Transfer button.