

FAQ Guide

Web Client – Administrator

xchangedocs

October 2020

Table of Contents

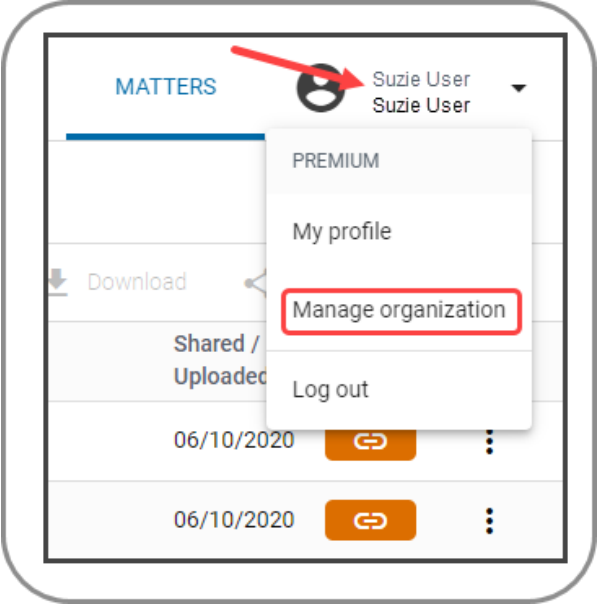
1	Managing Accounts/Organization.....	3
1.1	HOW DO I ADD MEMBERS TO MY ORGANIZATION?	3
1.2	A MEMBER THAT I RECENTLY ADDED HASN'T RECEIVED AN XCHANGEDOCS ACTIVATION EMAIL. WHAT SHOULD I DO?.....	4
1.3	A MEMBER IS TRYING TO LOGIN TO XCHANGEDOCS , BUT THEIR PASSWORD ISN'T WORKING / THEY'VE FORGOTTEN THEIR PASSWORD. HOW CAN I HELP THEM?	6
1.4	I MADE A MISTAKE IN THE MEMBER'S NAME WHEN I ADDED THEM TO XCHANGEDOCS , AND IT NEEDS TO BE CORRECTED. WHAT SHOULD I DO?.....	8
1.5	I MADE A MISTAKE IN THE MEMBER'S EMAIL ADDRESS WHEN ADDING THEM TO XCHANGEDOCS , AND IT NEEDS TO BE CORRECTED. WHAT SHOULD I DO?	9
1.6	A MEMBER'S EMAIL ADDRESS HAS CHANGED. WHAT SHOULD I DO?	9
1.7	A MEMBER HAS LEFT OUR ORGANIZATION AND SHOULD NO LONGER HAVE ACCESS TO XCHANGEDOCS . WHAT SHOULD I DO?.....	10
1.8	I MADE A MISTAKE IN MY ORGANIZATION NAME / ORGANIZATION DISPLAY NAME. WHAT SHOULD I DO?.....	11
1.9	I WANT TO MAKE AN EXISTING USER AN ADMIN. IS THAT POSSIBLE AND HOW DO I DO IT?	11
2	Managing Matters.....	12
2.1	A NEW MEMBER WAS ADDED TO XCHANGEDOCS , BUT THEY CANNOT ACCESS THEIR MATTERS. WHAT SHOULD I DO?.....	12
2.2	HOW DO I DELETE/REMOVE MATTERS FROM XCHANGEDOCS ?	13
2.3	AS THE ADMIN, CAN I SEE / ACCESS ALL XCHANGEDOCS MATTERS FOR MY ORGANIZATION?.....	14
2.4	WHAT HAPPENS TO XCHANGEDOCS MATTERS THAT HAVE NO FILE PARTICIPANTS?	14

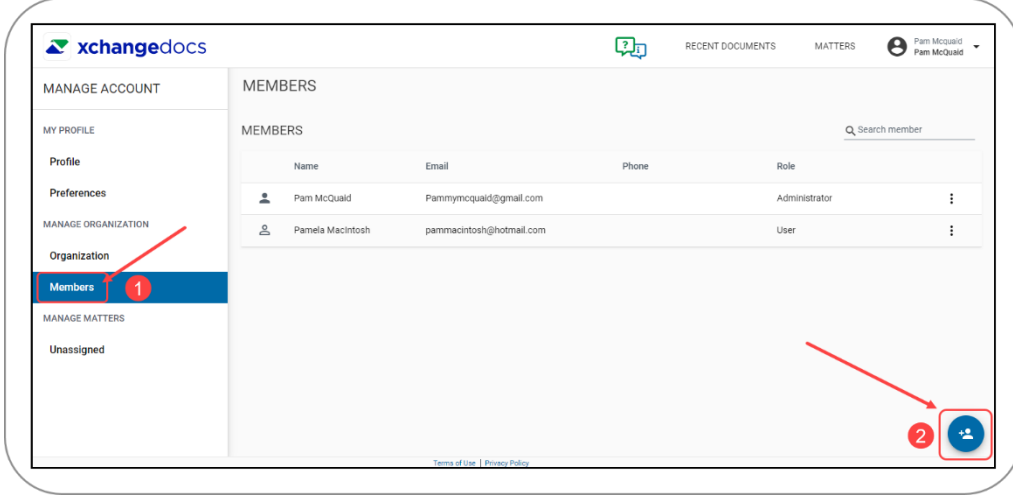


1 Managing Accounts/Organization

This section addresses FAQs related to managing accounts and organization members.

1.1 How do I add members to my organization?

Question	How do I add members to my organization?
Answer	<p>In xchangedocs, click on your username in the top-right corner and select Manage Organization, then:</p>  <p>The screenshot shows a user interface with a header 'MATTERS' and a user profile dropdown menu. The user's name 'Suzie User' is visible. The dropdown menu includes options: 'PREMIUM', 'My profile', 'Manage organization' (highlighted with a red box), and 'Log out'. Below the menu, there are two rows of data with dates '06/10/2020' and share icons.</p> <ol style="list-style-type: none">1. Navigate to the Members section (available in the pane on the left).2. Click the Add Organization Member icon at the bottom right.



Complete the information for the new member then click **Add**.

ADD MEMBER

First name
Sally

Last name
Assistant

Email
pammymcquaid+sallyassistant@gmail.com

Phone number
5555555555

Role
User

Cancel **Add**

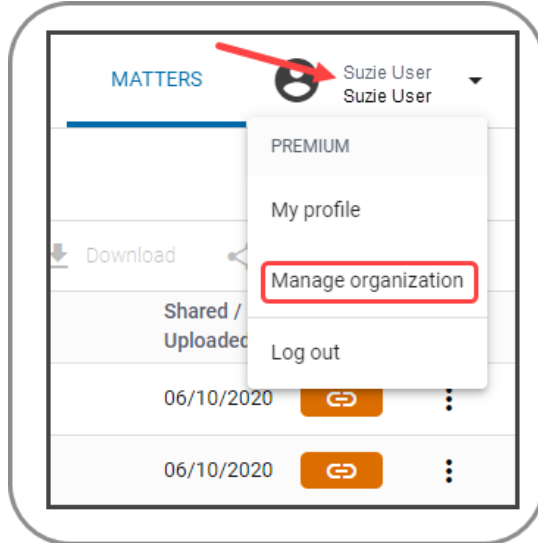
The new member will receive an email from **xchangedocs** where they can complete their account activation.

1.2 A member that I recently added hasn't received an **xchangedocs** activation email. What should I do?

Question	A member that I recently added hasn't received an xchangedocs activation email. What should I do?
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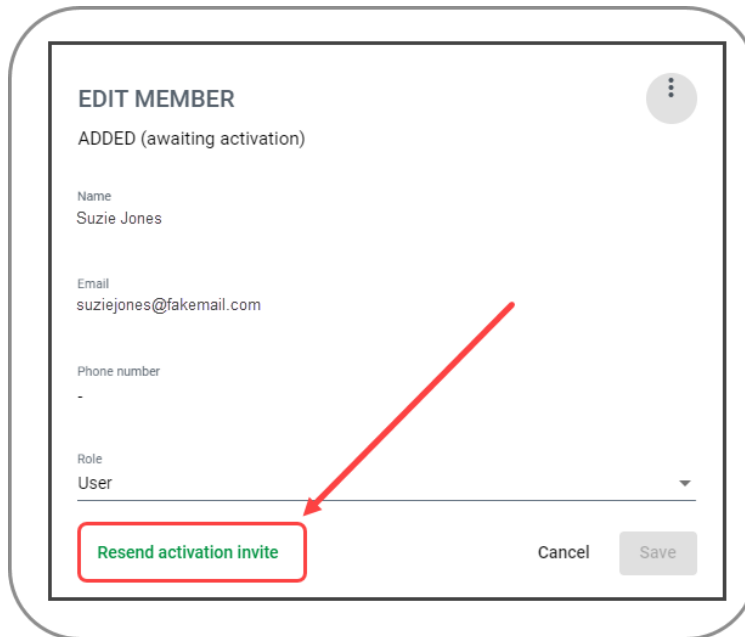
In **xchangedocs**, follow these steps:

1. Click on your username in the top-right corner and select **Manage Organization**.

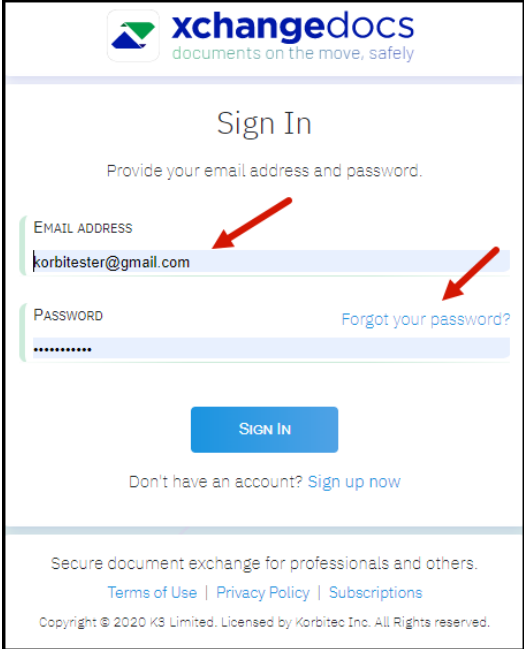


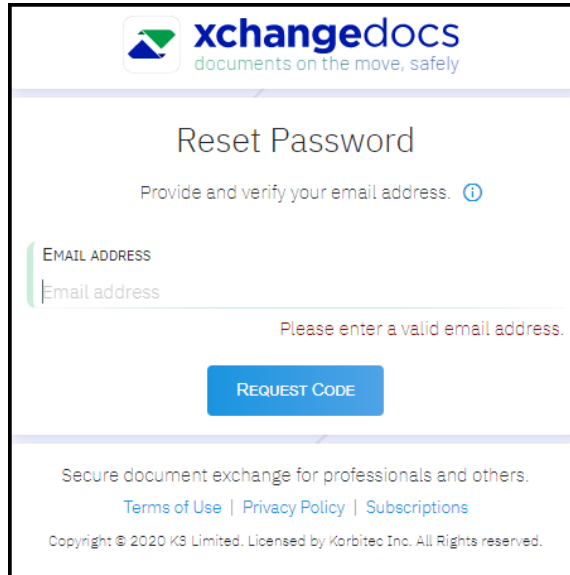
Answer

2. Navigate to the **Members** section (available in the pane on the left) and click on the user's name in the list.
3. In the window that opens, click **Resend activation invite**.

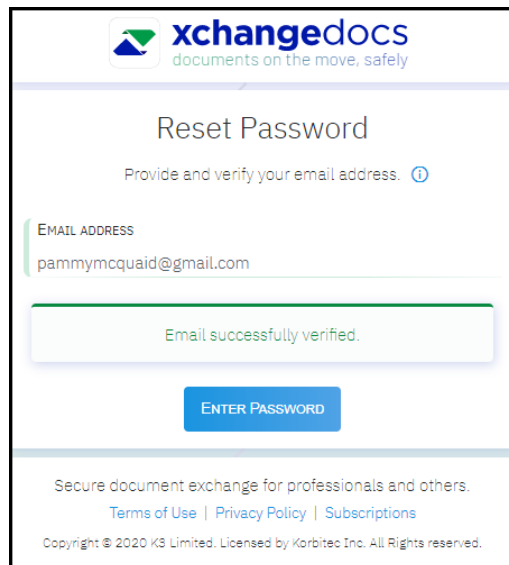


1.3 A member is trying to login to **xchangedocs**, but their password isn't working / they've forgotten their password. How can I help them?

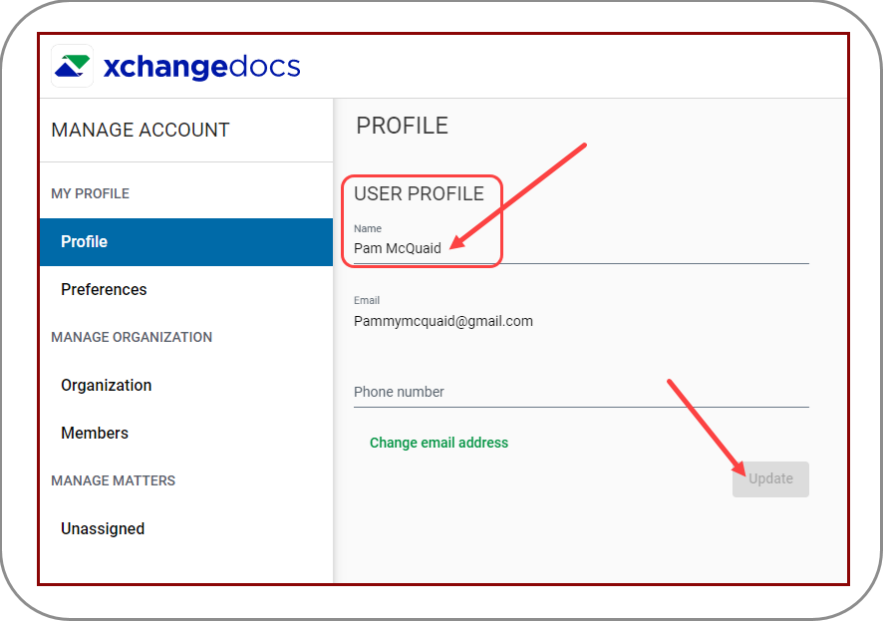
Question	A member is trying to login to xchangedocs , but their password isn't working / they've forgotten their password. How can I help them?
Answer	<p>In xchangedocs, the member should complete the following steps:</p> <ol style="list-style-type: none">1. Click the sign in button.2. Click the Forgot your password? link. <div data-bbox="443 743 963 1388"></div> <ol style="list-style-type: none">3. Enter the email address and click Request Code.



4. The code will be sent to the member's email. Copy the code and paste into the verification window.
5. The email address will be verified after which the member can then enter a new password.



1.4 I made a mistake in the member's name when I added them to **xchange**docs, and it needs to be corrected. What should I do?

Question	I made a mistake in the member's name when I added them to xchangedocs , and it needs to be corrected. What should I do?
Answer	<p>Once a member has been created, only they will have access to update/edit their name. Please have the member click on their username in the top right corner and select My profile. Under User Profile the member may update their name and then click Update to save their changes.</p> <div data-bbox="386 737 1263 1356"></div> <p>Alternatively, if the member has not yet activated their account, you can delete their user account and re-add them.</p>

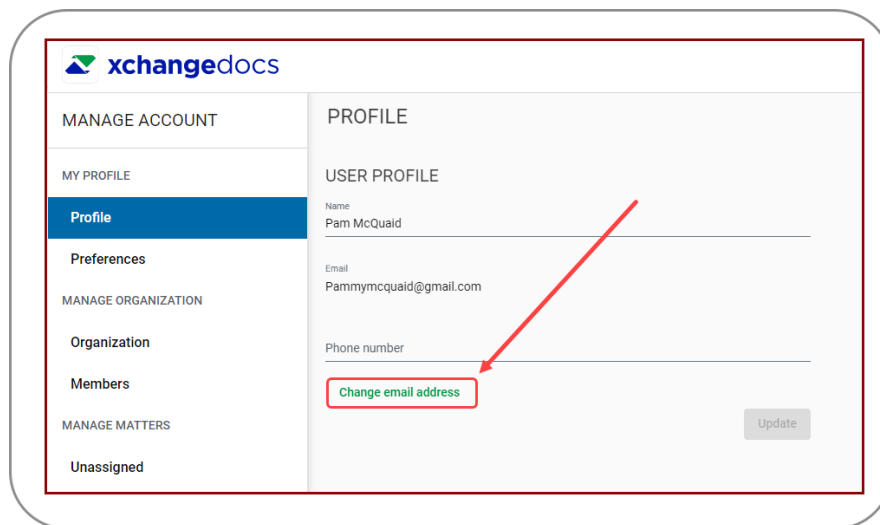
1.5 I made a mistake in the member's email address when adding them to **xchange**docs, and it needs to be corrected. What should I do?

Question	I made a mistake in the member's email address when adding them to xchangedocs , and it needs to be corrected. What should I do?
Answer	The member's account should be deleted and re-added. Click on your username in the top-right corner and select Manage Organization . Navigate to the Members section (available on in the pane on the left) and find the member in the list. Click the three-dot menu beside the member's name and select Remove . Follow the prompts and xchangedocs will confirm that the member has been removed. Please re-add the member using the correct email address.

1.6 A member's email address has changed. What should I do?

Question	A member's email address has changed. What should I do?
Answer	Once a member has been created only they have access to update their email address. Please have the member click on their username in the top right corner and select My profile . Under User Profile the member may update their email address by clicking on Change email address and following the prompts.

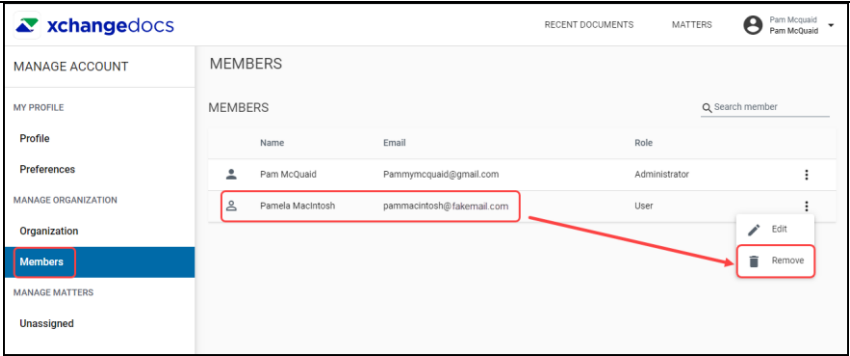




NOTE: The member will be signed out of **xchangedocs** to complete the process.

1.7 A member has left our organization and should no longer have access to **xchangedocs**. What should I do?

Question	A member has left our organization and should no longer have access to xchangedocs . What should I do?
Answer	<p>The member should be deleted. Deleting a member automatically removes them as a File Participant from all matters which they were added to and ensures the member can no longer access xchangedocs on behalf of your organization. If any matters had the user as the only File Participant, they will be moved to the Unassigned Matters section and should be reviewed.</p> <p>To delete the member, click on your username in the top-right corner and select Manage Organization. Navigate to the Members section (available in the pane on the left) and find the member in the list. Click the three-dot menu beside the member's name and select Remove.</p>



Follow the prompts and **xchangedocs** will confirm the member has been removed.

To review **Unassigned Matters**, click on your username in the top-right corner and select **Unassigned** under the **Manage Matters** section (available in the pane on the left).

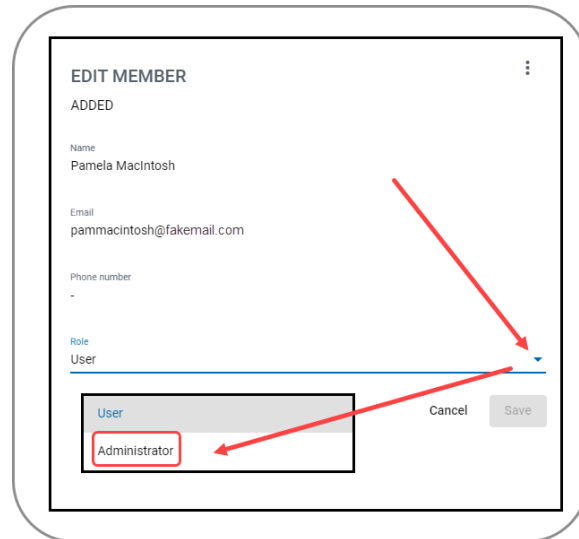
1.8 I made a mistake in my Organization Name / Organization Display Name. What should I do?

Question	I made a mistake in my Organization Name / Organization Display Name. What should I do?
Answer	Click on your username in the top-right corner and select Manage Organization . Edit the Organization Name / Organization Display Name and click Update to save your changes.

1.9 I want to make an existing user an admin. Is that possible and how do I do it?

Question	I want to make an existing user an admin. Is that possible and how do I do it?
Answer	Yes, it is possible. You may assign as many admins as necessary. Click on your username in the top-right corner and select Manage Organization . Navigate to the Members section (from the pane on the left) and find the user in the list. Click the three-dot menu beside the user's name and

select **Edit**. In the **Role** section at the bottom of the page click on the dropdown menu and select **Administrator**.



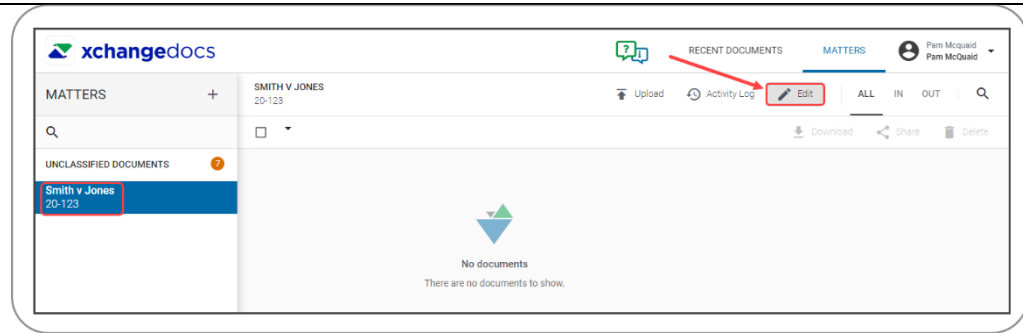
Click **Save** and follow the prompt.

2 Managing Matters

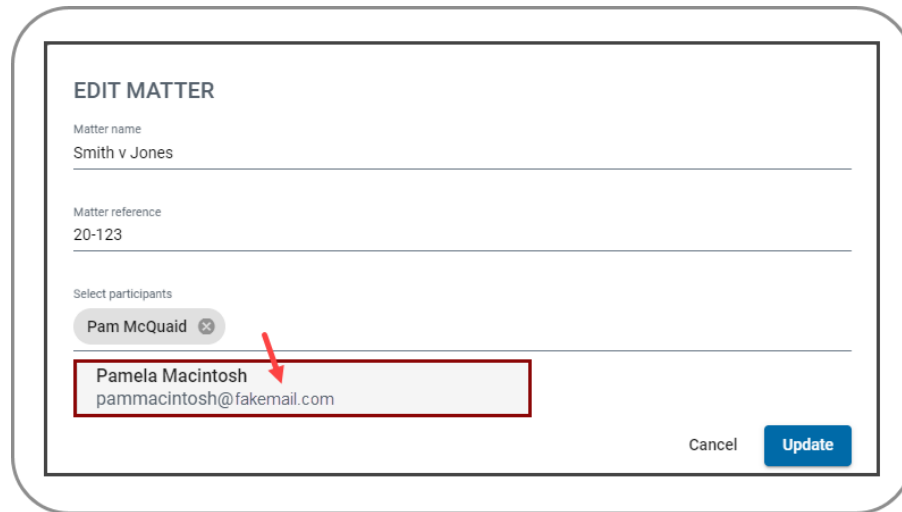
This section addresses FAQs related to managing/organizing your organization's Matters.

2.1 A new member was added to **xchangedocs**, but they cannot access their matters. What should I do?

Question	A user was added to xchangedocs , but they cannot access their matters. What should I do?
Answer	Members must be added as a File Participant to any matter they are required to access. Navigate to the matter and click on Edit in the top bar.



Click in the **Select Participants** section and select the user from the list that appears.



Repeat this process for all matters the user should have access to.

NOTE: Members who are added as **File Participants** on a matter may also add or remove other members to the matters.

2.2 How do I delete/remove matters from xchangedocs?

Question	How do I delete/remove matters from xchangedocs ?
Answer	The option to delete/remove matters is not currently available. However, this feature is being added in a future version of xchangedocs .

2.3 As the admin, can I see / access all **xchangedocs** matters for my organization?

Question	As the admin, can I see / access all xchangedocs matters for my organization?
Answer	No. Only those members added as File Participants can access the matter. If you require access to all matters, please ensure users add you as a File Participant .

2.4 What happens to **xchangedocs** matters that have no File Participants?

Question	What happens to xchangedocs matters that have no File Participants?
Answer	They are moved to the Unassigned Matters section, only accessible by the admin. To review Unassigned Matters, click on your username in the top-right corner and select Unassigned under the Manage Matters section (available in the pane on the left).

