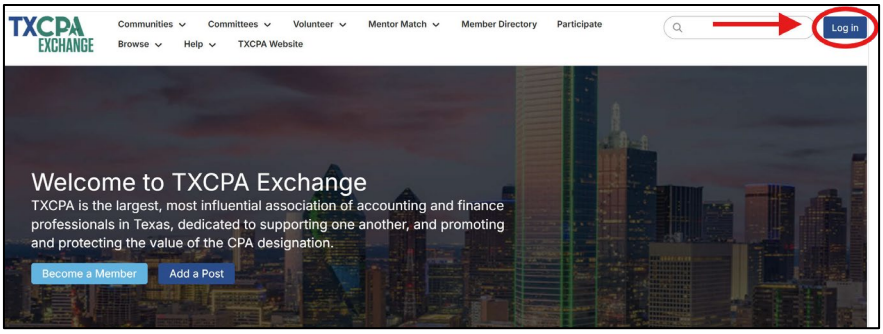
QUICK START GUIDE

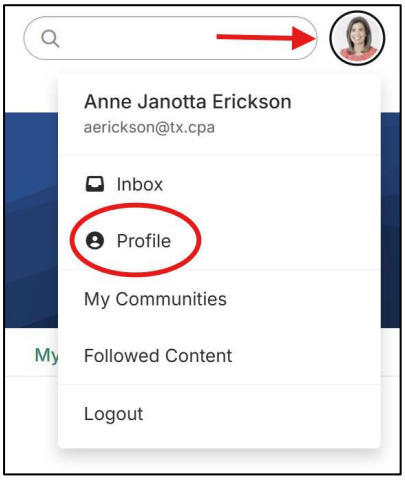
WELCOME TO TXCPA EXCHANGE!

This online member community allows you to connect, learn and share with colleagues like never before. Turn to this handy quick start guide to understand the basics and get the most out of this robust member benefit.



To access TXCPA Exchange:
- Go to exchange.tx.cpa
- Click Log in located in the top right corner

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



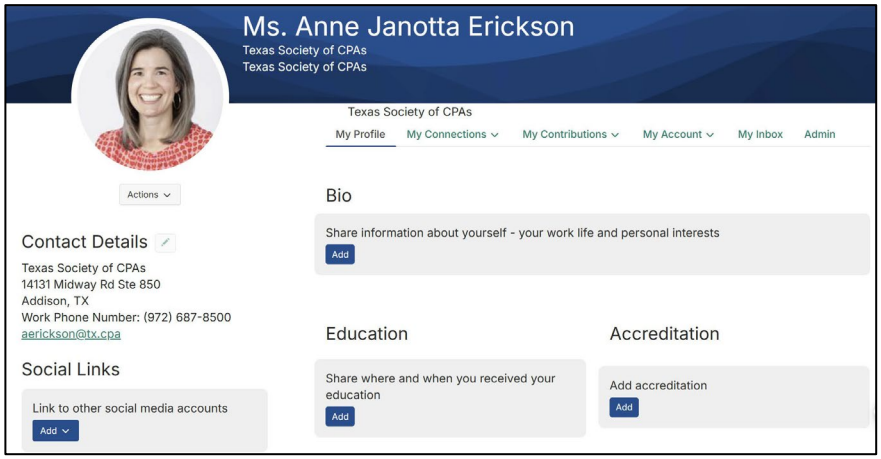
Update your profile
Access your profile by clicking the circle in the top right corner and selecting Profile from the dropdown.

We've used your information from our database to complete the basic parts of your new profile, including your name, organization and professional designations.

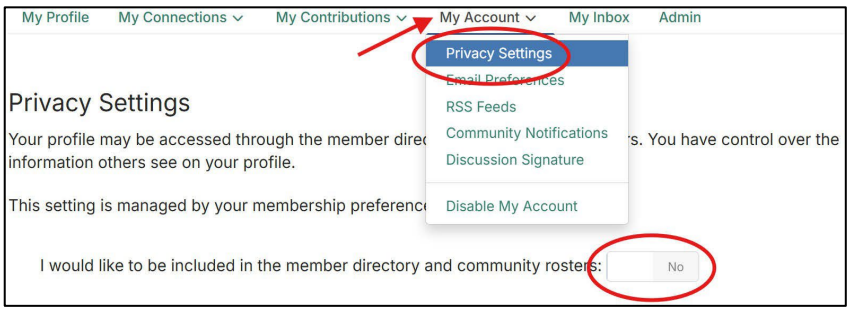
Complete your profile to help other members discover and connect with you. Add your bio, education, work history, CPE interests and areas of expertise.

Don't forget to upload a photo. It helps fellow members get to know who's behind the profile.

Note: You can manage the visibility of your profile in Privacy Settings.



QUICK START GUIDE

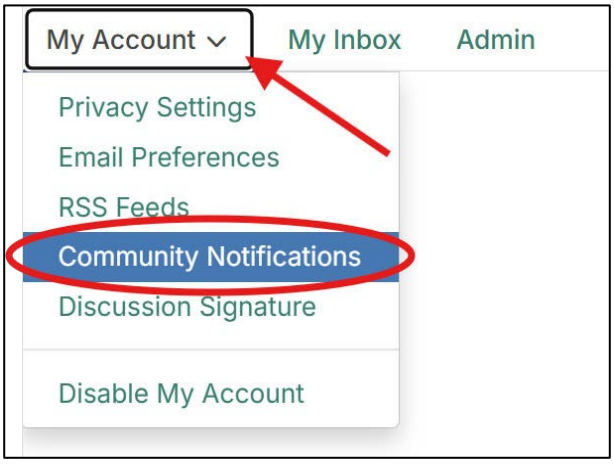


Privacy Settings

Personalize who can see your profile information by going to Profile > My Account > Privacy Settings.

Here you can toggle the slider button to "no" if you do not want to be included in the Member Directory.

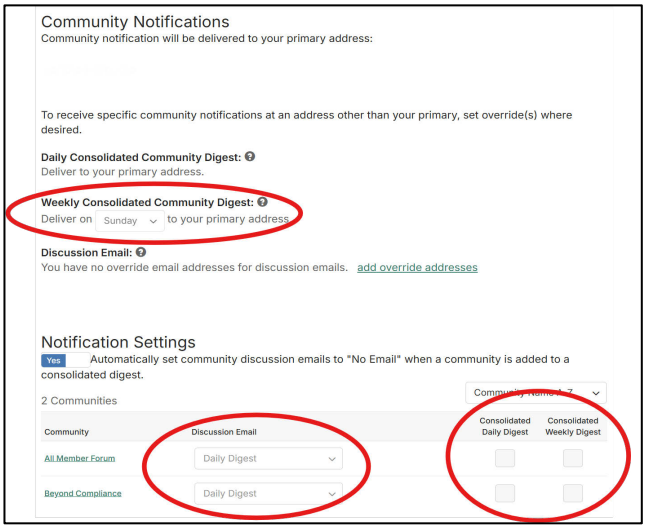
NOTE: The Member Directory is only visible to TXCPA members. It can't be accessed or used by people outside the organization.



Notification Settings

Personalize how often you receive TXCPA Exchange email notifications by going to Profile > My Account > Community Notifications.

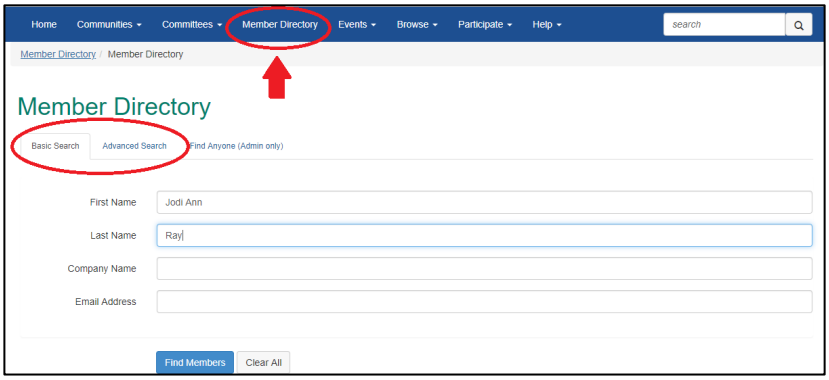
All members are automatically subscribed to the All Member Forum's Daily Digest.



Choose how your community messages are delivered to you:

- 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: Read and reply to posts directly within TXCPA Exchange. Must be logged in.
- Consolidated daily or weekly digest: Receive notifications from all your communities in one daily or weekly email. You can choose the day.

QUICK START GUIDE

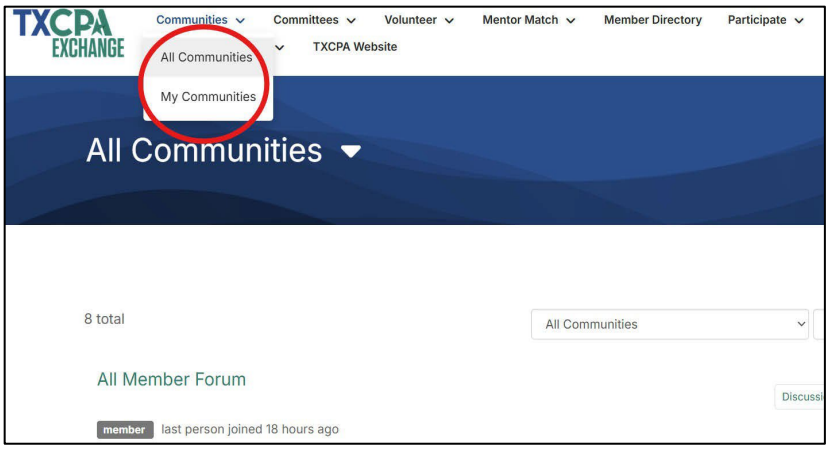




Member Directory

This is a great way to find TXCPA members. Search for other members by name, company or email address. Or use the Advanced Search function to look for members by chapter, accreditation, areas of expertise and more.

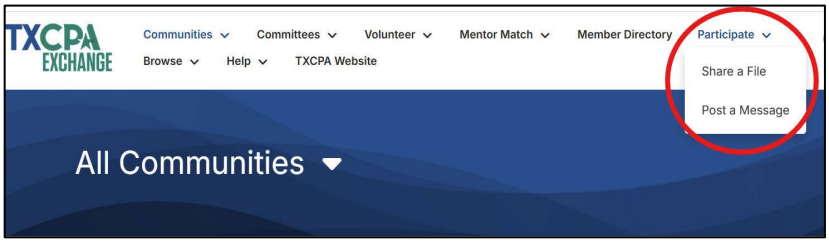
The TXCPA Member Directory allows you to view profiles, send messages or add someone as a contact directly from the search results page.



TXCPA Communities

Connect with members who share your interests. You're automatically enrolled in the All Member Forum, and you can join additional topic-based communities at any time.

Click All Communities to browse available groups or My Communities to see the communities you've joined.

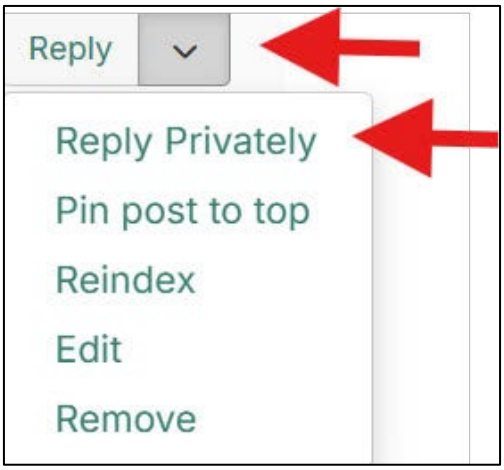


Start a discussion

Ready to join the conversation? Create a new post by selecting Participate > Post a Message and choosing a community.

You can also post directly within any community by clicking Add Discussion.

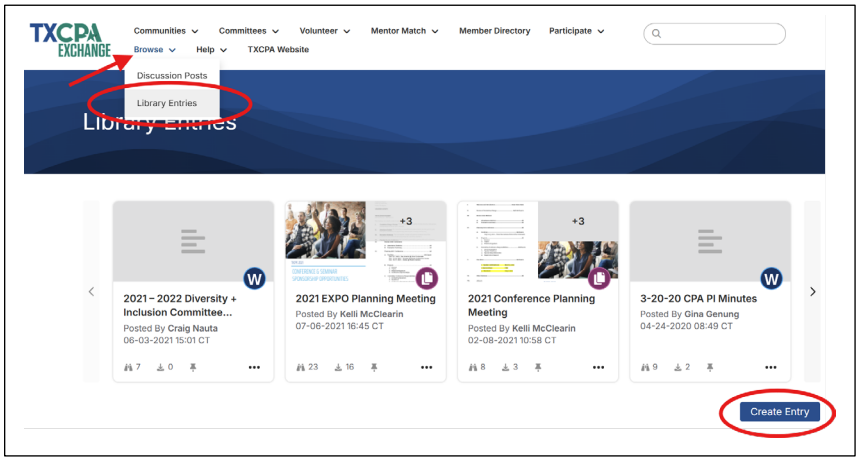
QUICK START GUIDE



Join the conversation

Every community, including the All Member Forum, features discussion threads where members can ask questions, share insights and exchange ideas.

- Click any post to read the discussion and view responses.
- Click Reply to add your thoughts to the conversation.
- Choose Reply Privately to send a private message to the author.

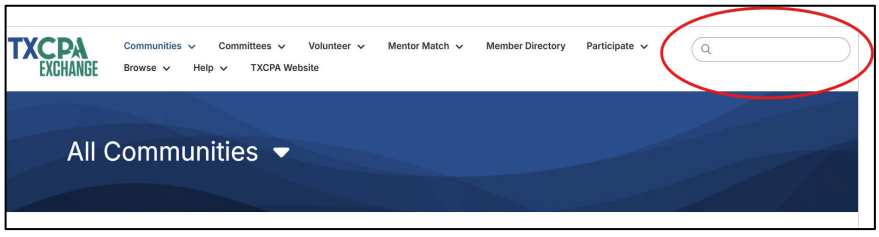


Resource Library

Learn from what others have already created. Explore the Resource Library for:

- Templates
- Tools
- Sample policies
- Meeting notes
- Best practices

See something helpful? Leave a comment. Have expertise to share? Add your own resource to the library.



Search

Looking for a discussion, document or resource? Use the search bar to find content across communities and resource libraries.