

Virtual Room – File Submission Rooms Customer Guide

This document contains information about what the Virtual Room is, getting started using it, and some helpful tips to address common questions new Virtual Room users have. This document only pertains to File Submission Room types. Discussion Rooms are explained in a separate document.

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What is Virtual Room?

Virtual Room is a system created by the Minnesota Department of Revenue to collaborate with our customers. Specifically, File Submission rooms are used to receive data from outside sources so it can be processed by Revenue.

Getting Started with Virtual Room

How do I start using the Virtual Room?

If you are involved with a process that uses Virtual Rooms, your contact at the department will send you an invite to the room. Once you receive the invitation, you can activate your Trusted Exchange account, set up a password, and sign in to the room.

Note: If you already have a Trusted Exchange account, you do not need to activate or set up a new password. Instead, your invite will have a link that will go straight to the new room. You will already have a Trusted Exchange account if you are a member of a different Virtual Room, an Audit Room, or if you also use the Electronic Certificate of Real Estate Value (eCRV) system.

Activating Your Trusted Exchange Account

Use the link in your invitation email to activate your account and follow the on-screen process.

The steps include:

1. Request an activation code
2. Enter the code that is emailed to you
Tip: This code expires after 30 minutes.
3. Create your password
4. Return to the Virtual Room sign in page and use your new password!

Accessing the Virtual Room System

After you are invited to a Virtual Room and activate your Trusted Exchange account, you can log in to the system. The best way to sign into Virtual Room is by creating a bookmark on the Audit Room and Virtual Room User Guide page on our website:

1. Go to www.revenue.state.mn.us

2. Type "Virtual Room" into the search box
3. Use your browser to bookmark this page.

Note: DO NOT bookmark the Virtual Room sign-in page. If you do, you will get an error message that says "Page Not Found" next time you try to sign in.

Using the Virtual Room

After you sign in, you will be able to enter the room. You may see a list of rooms after you sign in where you can choose the room you want to enter.

Once you are inside the room, all the room features you need are available for you:

- Upload a file
- Review past file submissions
- View details for past file submissions (check the status)
- See a list of Room Members and the main department contact for the room

Note: The amount of information you see in the room depends on the purpose of the room, what type of files are submitted, and the organization you work with. In some rooms, you are limited only to view your own submissions.

Room Contact Information

The main contact information for the room is displayed on the Members page and in the signature line of emails sent by the room. If you ever have questions about the Virtual Room system, this should be your first point of contact.

Uploading a File

To submit a file:

1. Select the Upload File button on the main page of the room
2. Select Choose File to locate the file in your system
3. Select Upload File to submit the file to the room.

Once a file is submitted, it cannot be downloaded again or recalled.

Check the File Status

After a file is submitted, use the View Details menu to see the file's status history.

- If your room is set up to provide a downloadable Response File, it will be available from the dropdown menu in the View Details column of the table. Open the menu and select the option to Download to see the file.

Advanced Search

The list of file submissions will show you up to 50 records from the last 7 days. Use the Advanced Search to adjust the date range, number of results to display, or look for a specific file by Transaction ID, File Name, or Submitter.

Other Questions

If you are experiencing a problem with Virtual Room, your first contact is the main contact listed in the room or on the invite email to the room. If you are unable to sign in, follow the steps outlined in the 'Password and Sign In Problems' section first.

If you're still unable to sign in to get the main contact information, use the [Department of Revenue website](#) to locate contact information for the process or program you use the Virtual Room for.

Password and Sign-in Help

I think I forgot my password, what should I do?

If you forget your password, the first thing you should do is select the 'Reset Password' link. This will take you through the self-service steps to reset your Trusted Exchange account password.

The process is almost the same as when you first activated the account:

1. Enter your email address (the same one you use to sign in to Virtual Room normally) and click Send Code.
2. Enter the code that is emailed to you.
3. Enter the password you would like to use.
4. Return to the Virtual Room sign in page and sign in with your new password.

I reset my password, but it still isn't working. Now what?

After you reset your password, the system will send you a confirmation email with the subject line "Your Trusted Exchange Password is Created."

If you didn't receive this email, your password wasn't correctly reset. To fix this, you can repeat the 'Reset Password' process again.

Note: If this problem happens more than once, contact your department representative.

It says my password expired, what happened?

Your Trusted Exchange account password needs to be reset every 90 days for added security. If your password expires, follow the on-screen prompt to reset your password.

You will receive an email reminder from the Trusted Exchange system when your password is about to expire.

I tried signing in, but it says my account is locked!

For added security, the Trusted Exchange system will lock any account if there are more than 6 failed attempts to sign in. To unlock your account, you must contact your department representative.