

# Getting Started with SmartVault

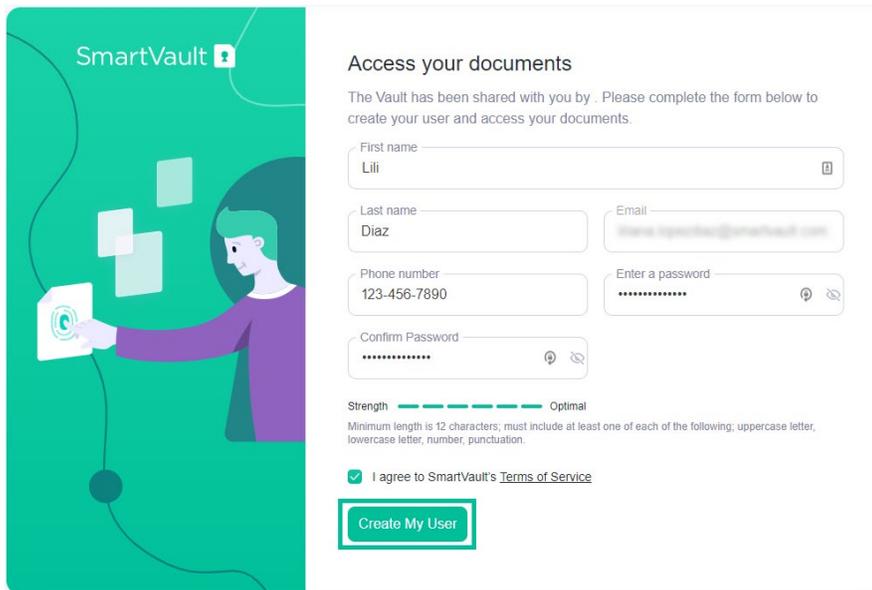
## Activating your Guest Account

1. Open your activation email from SmartVault.
2. Click **SmartVault Activation Link**.
3. Enter your phone number and password.

### Note

The rest of your information is already entered by default.

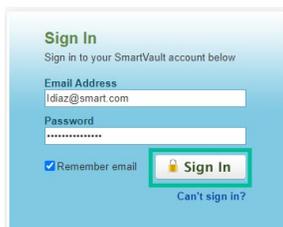
4. Click **Create My User**.



The image shows a screenshot of the SmartVault activation form. On the left is a green illustration of a person holding a document. The form on the right is titled "Access your documents" and contains the following fields: First name (Lili), Last name (Diaz), Email (lidi@smart.com), Phone number (123-456-7890), and Enter a password (masked with dots). Below the password field is a "Confirm Password" field. A strength indicator shows a green bar reaching "Optimal". A checkbox is checked for "I agree to SmartVault's Terms of Service". A "Create My User" button is highlighted with a red box.

## Signing In to SmartVault as a Guest

1. Go to [my.smartvault.com](https://my.smartvault.com).
2. Enter your email address and password you used to activate your guest account.
3. Click **Sign In**.



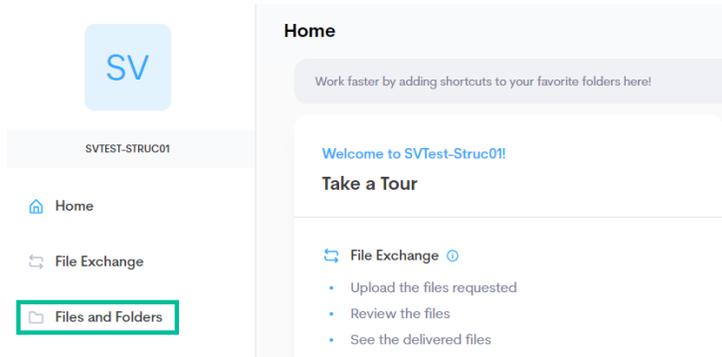
The image shows a screenshot of the SmartVault sign-in form. It is titled "Sign In" and includes the text "Sign in to your SmartVault account below". The form contains fields for "Email Address" (lidi@smart.com) and "Password" (masked with dots). There is a "Remember email" checkbox which is checked. A "Sign In" button is highlighted with a red box. Below the button is a link that says "Can't sign in?".

## Note

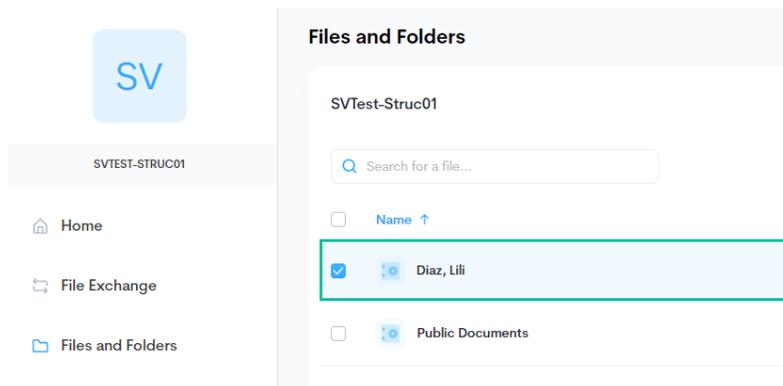
If you have forgotten your password, click **Can't sign in?**

## Uploading Files to SmartVault

1. Log in to your SmartVault account.



2. Select **Files and Folders**.
3. Click on the folder with your name or company name, referred to as a Vault within SmartVault.

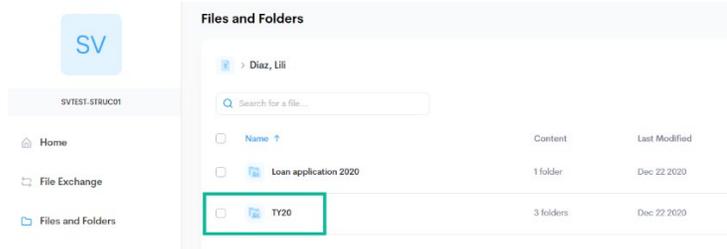


4. Navigate to the folder where you would like to upload your files.

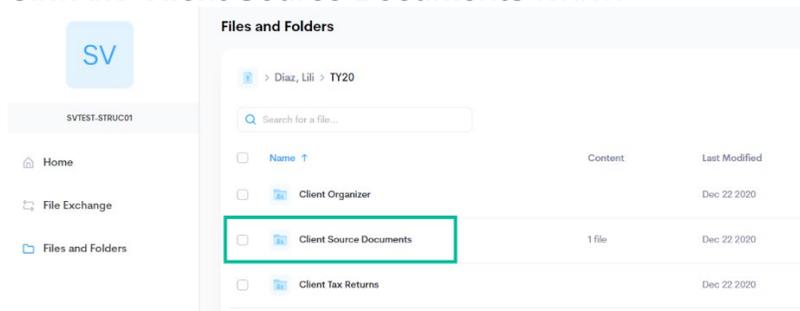
## Note

In this example, we are uploading a 2020 W-2 form requested by your CPA into the Client Source Documents folder.

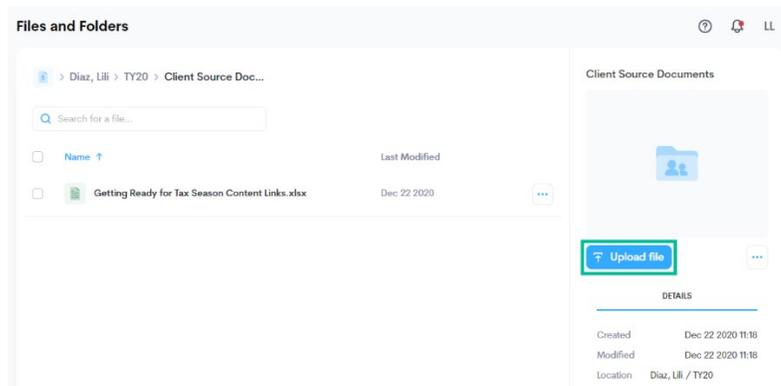
5. Click the tax year folder **2020**.



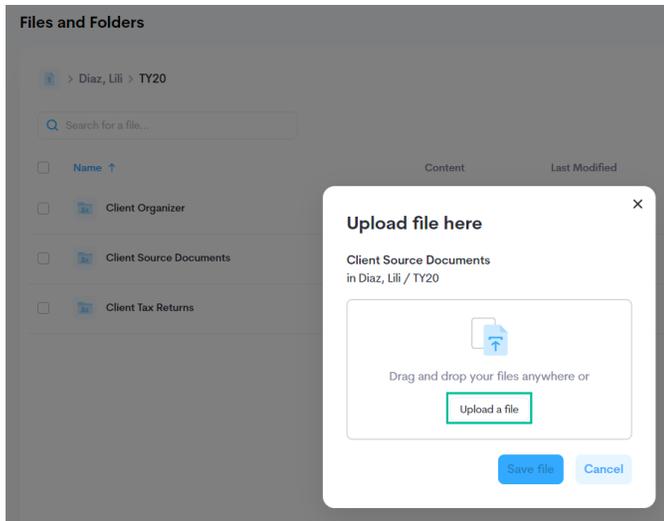
6. Click the **Client Source Documents** folder.



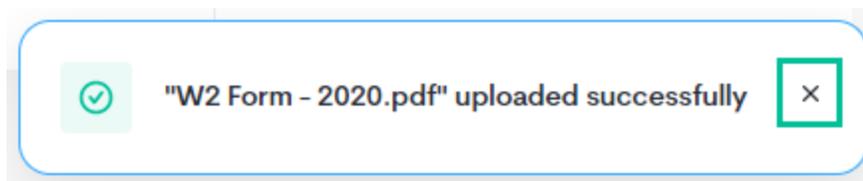
7. Click **Upload file**



8. Click **Upload a file** to browse for the file or drag and drop it into the window.



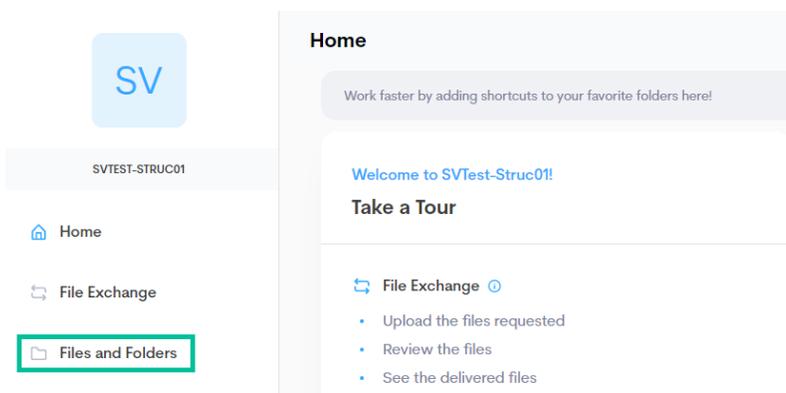
9. Click **Save file**. A confirmation message appears.
10. Click the **x** to close the message.



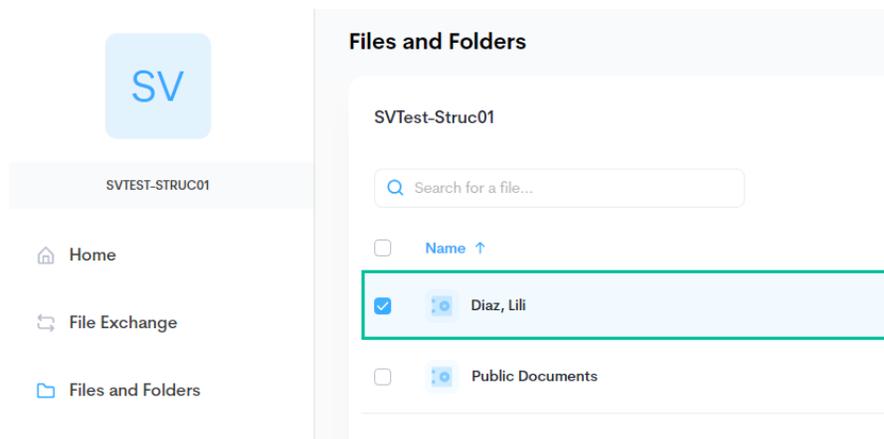
Your accountant will automatically receive a notification whenever you upload files to your folder, so you don't have to let them know.

## Downloading Files from SmartVault

1. Log in to your SmartVault account.
2. Select **Files and Folders**.



3. Click on the folder with your name or company name, referred to as a Vault within SmartVault.

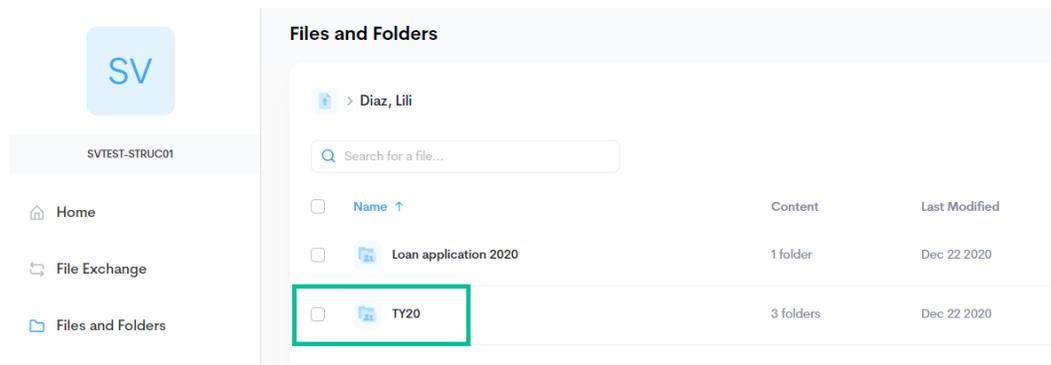


4. Navigate to the folder containing the files you want to download.

### Note

In this example, we are downloading a 2020 tax return that your CPA has sent.

5. Click the tax year folder **2020**.



6. Click the tax return PDF to view it in the browser.

## Files and Folders

> Diaz, Lili > TY20 > Client Source Doc...

Search for a file...

<input type="checkbox"/>	Name ↑	Last Modified
<input type="checkbox"/>	Book.xlsx	Dec 22 2020
<input type="checkbox"/>	Getting Ready for Tax Season Content Links.xlsx	Dec 22 2020
<input type="checkbox"/>	Tax Return TY20.jpg	Dec 22 2020
<input type="checkbox"/>	<b>Tax Return TY20.pdf</b>	Dec 22 2020

7. Click **Download** to save a copy of your tax return and click **Back** to close the preview window.

The screenshot shows a PDF viewer interface. On the left, there is a 'Back' button and a file name 'Tax Return TY20.pdf' with a 'Last Modified on Tuesday, December 22, 2020 12:17' timestamp. The main area displays the 1040 U.S. Individual Income Tax Return form for 2019. The form includes sections for Filing Status, Personal Information, Home Address, Foreign Information, Dependents, and Tax Summary. The Tax Summary table is partially visible, showing various income and deduction categories. On the right side of the viewer, there is a 'Details' panel with 'PROPERTIES' and 'ACCESS' sections. The 'PROPERTIES' section shows the file was created and modified on Tuesday, December 22, 2020 12:17, with a location of 'Diaz, Lili / TY20 / Client Source Documents', a type of 'pdf', a size of '1000 KB', and a version of '1'. The 'ACCESS' section shows a 'Download' button and a list of users with access permissions.