

Getting Started with SmartVault

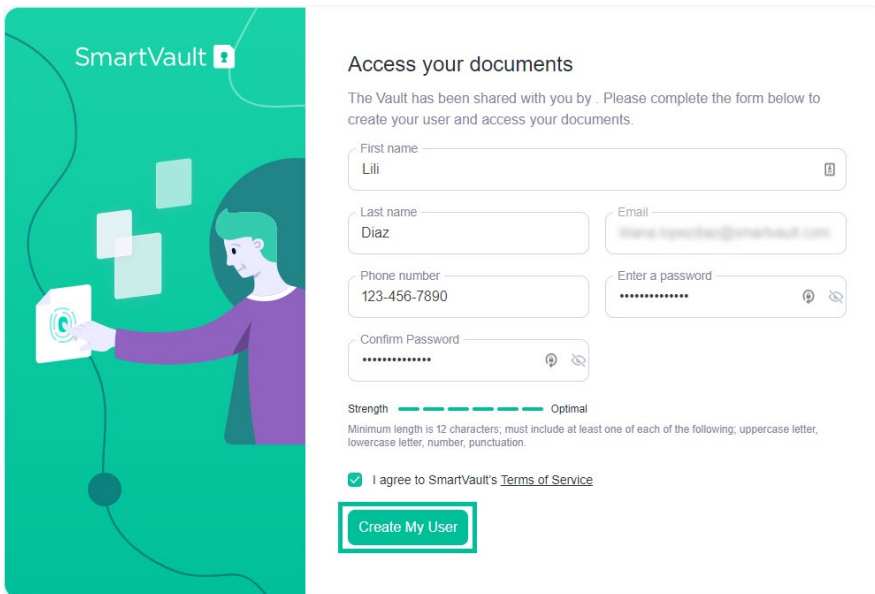
Activating your Guest Account

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.

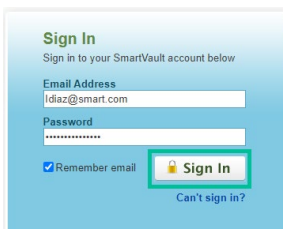
4. Click **Create My User**.



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.
2. Enter your email address and password you used to activate your guest account.
3. Click **Sign In**.



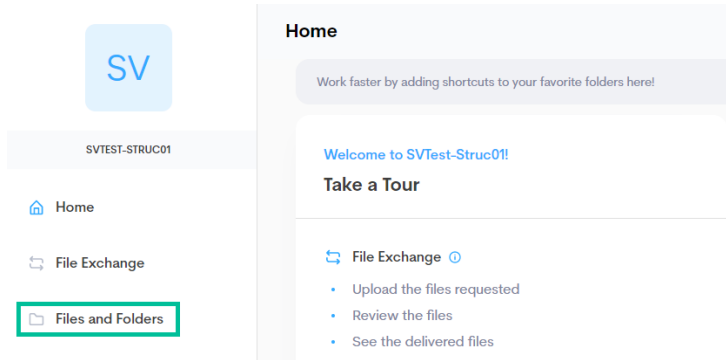
The image shows a screenshot of the SmartVault sign-in form. It is titled "Sign In" and includes the text "Sign in to your SmartVault account below". The form has two input fields: "Email Address" (lidi@smart.com) and "Password" (masked with dots). There is a "Remember email" checkbox which is checked.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

Note

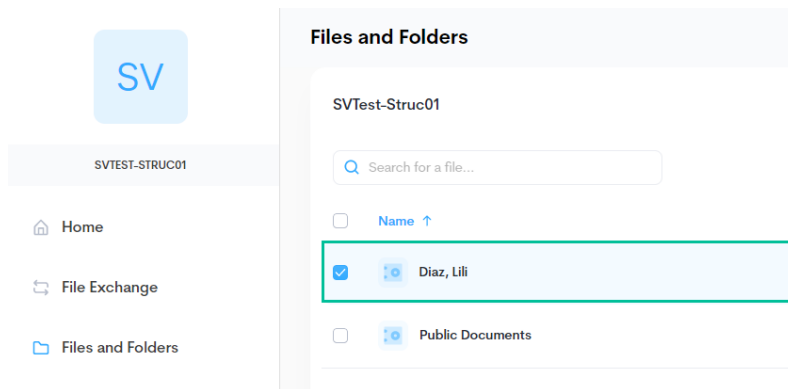
If you have forgotten your password, click **Can't sign in?**

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.

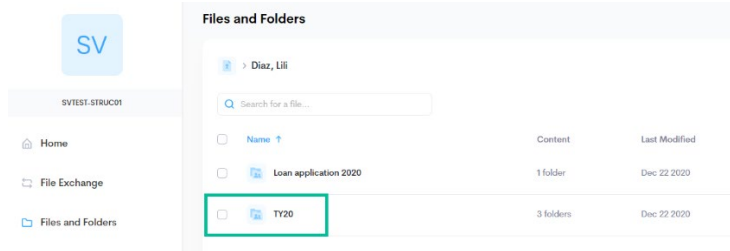


4. Navigate to the folder where you would like to upload your files.

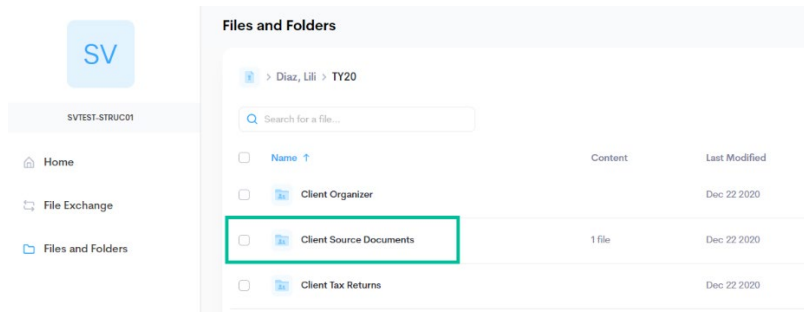
Note

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

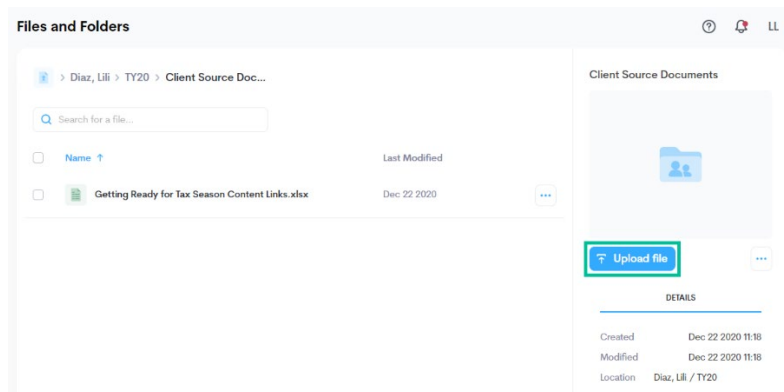
5. Click the tax year folder **2020**.



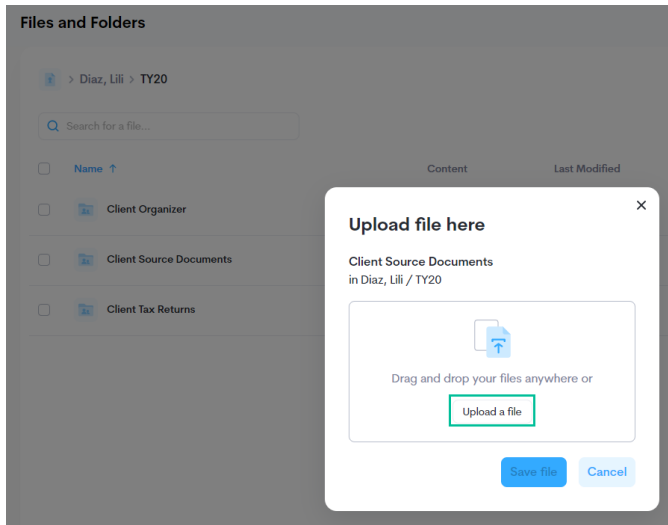
6. Click the **Client Source Documents** folder.



7. Click **Upload file**



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



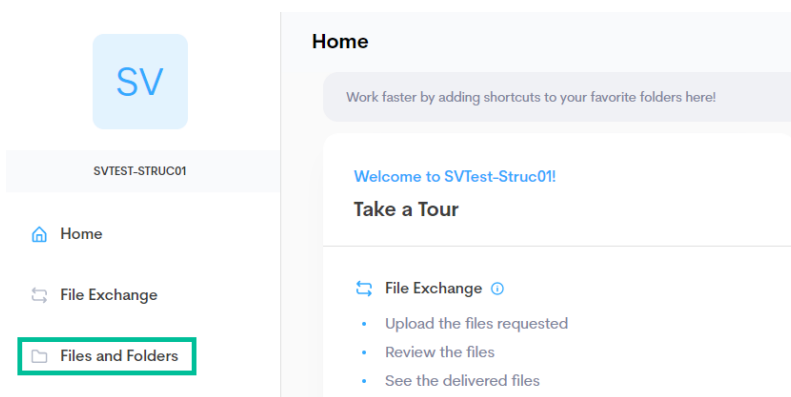
9. Click **Save file**. A confirmation message appears.
10. Click the **x** to close the message.



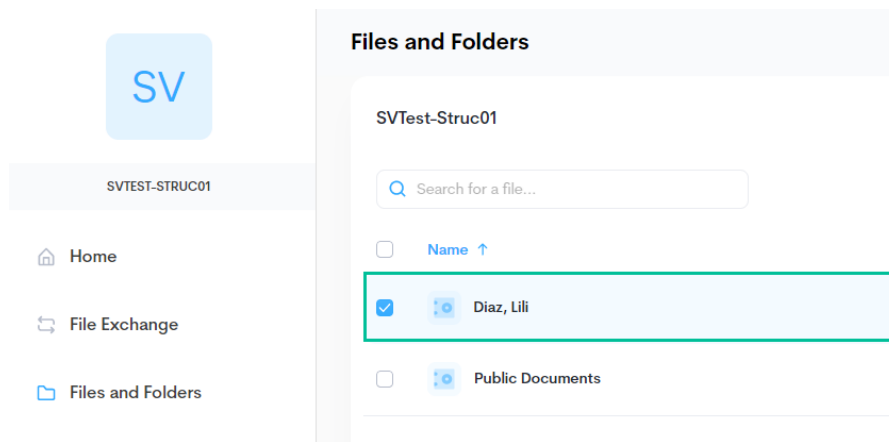
Your accountant will automatically receive a notification whenever you upload files to your folder, so you don't have to let them know.

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.

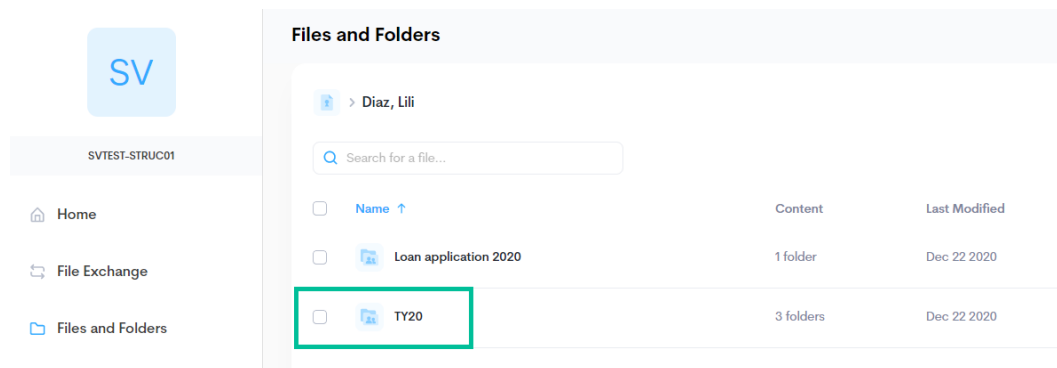


4. Navigate to the folder containing the files you want to download.

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"/>	Tax Return TY20.pdf	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 document icon. The main area displays a 2019 U.S. Individual Income Tax Return form (1040). The form includes sections for Filing Status, Personal Information, Home Address, Foreign Information, Dependents, and Taxable Income. The 'Taxable Income' section shows a total of \$55,000. On the right, a 'DETAILS' sidebar is visible, showing the document's properties, including the creation and modification dates (December 22, 2020), location, and file size (1000 KB).