

Getting Started with the New Guest View



Overview

Guests are individuals with whom a SmartVault user wants to share documents. Guests can upload and access files through the SmartVault portal, inbox, and mobile app.

Typically, an accountant invites their clients to access important tax forms in SmartVault as a Guest user. This ensures that each client can only access their own tax forms in their vault.

As a Guest user, you can only upload and download files into the specific folder to which you have been granted access.

How do I use SmartVault?

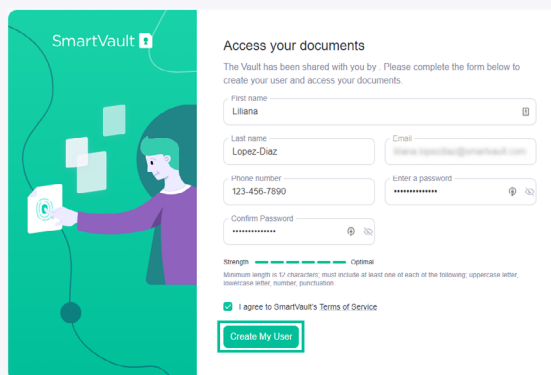
You can access SmartVault via a web browser or your mobile phone. We will add you to our SmartVault account as a guest, and you will need to activate your account in order to complete the sign-up process. Follow the steps below to start sharing documents securely!

HOW IT WORKS

Activating your Guest Account

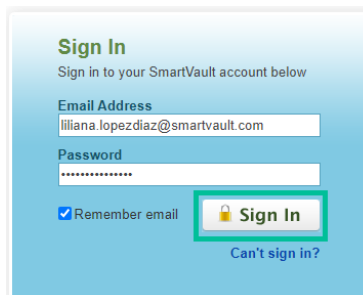
To activate your guest account and access SmartVault, you must have your account administrator invite you. If you have not received an invitation email, reach out to your account administrator and ask them to invite you.

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**.



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**.

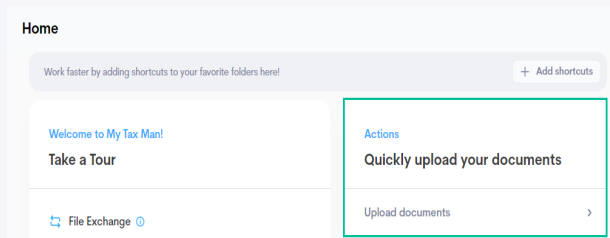


UPLOADING AND DOWNLOADING YOUR FILES

Quickly Upload Files to SmartVault

Upload files quickly from the **Actions** tile.

1. Click the **Upload documents** link.
2. You will see only the folders where you can upload files. Click the folder where you would like to upload your files.
3. Click **Upload File** to open the Upload file here window.
4. Click **Upload a file** to browse for the file or drag and drop it into the window.
5. Click **Save file**. A confirmation message appears.
6. Click the **x** to close the message.



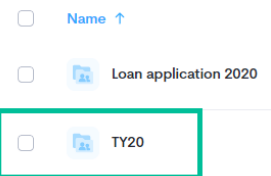
Upload and Download Files from Files and Folders

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

In the example below, we are:

- Uploading a 2020 W-2 form requested by your CPA into the Client Source Documents folder.
- Downloading a 2020 tax return that your CPA has sent.

TY20 Folder



To Upload

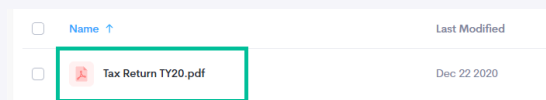
1. Navigate to the folder where you would like to upload your files.
2. Click the tax year folder **TY20**.
3. Click the **Client Source Documents** folder.
4. Follow steps **3 to 6** from above.

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

If you need additional assistance with your SmartVault account, reach out to SmartVault Support by visiting help.smartvault.com.

To Download

1. Navigate to the folder containing the files you want to download.
2. Click the tax year folder **TY20**.
3. Click the tax return PDF to view it in the preview window.



4. Click **Download** to save the file to your device, if necessary.



5. Click **Back** to close the preview window.

