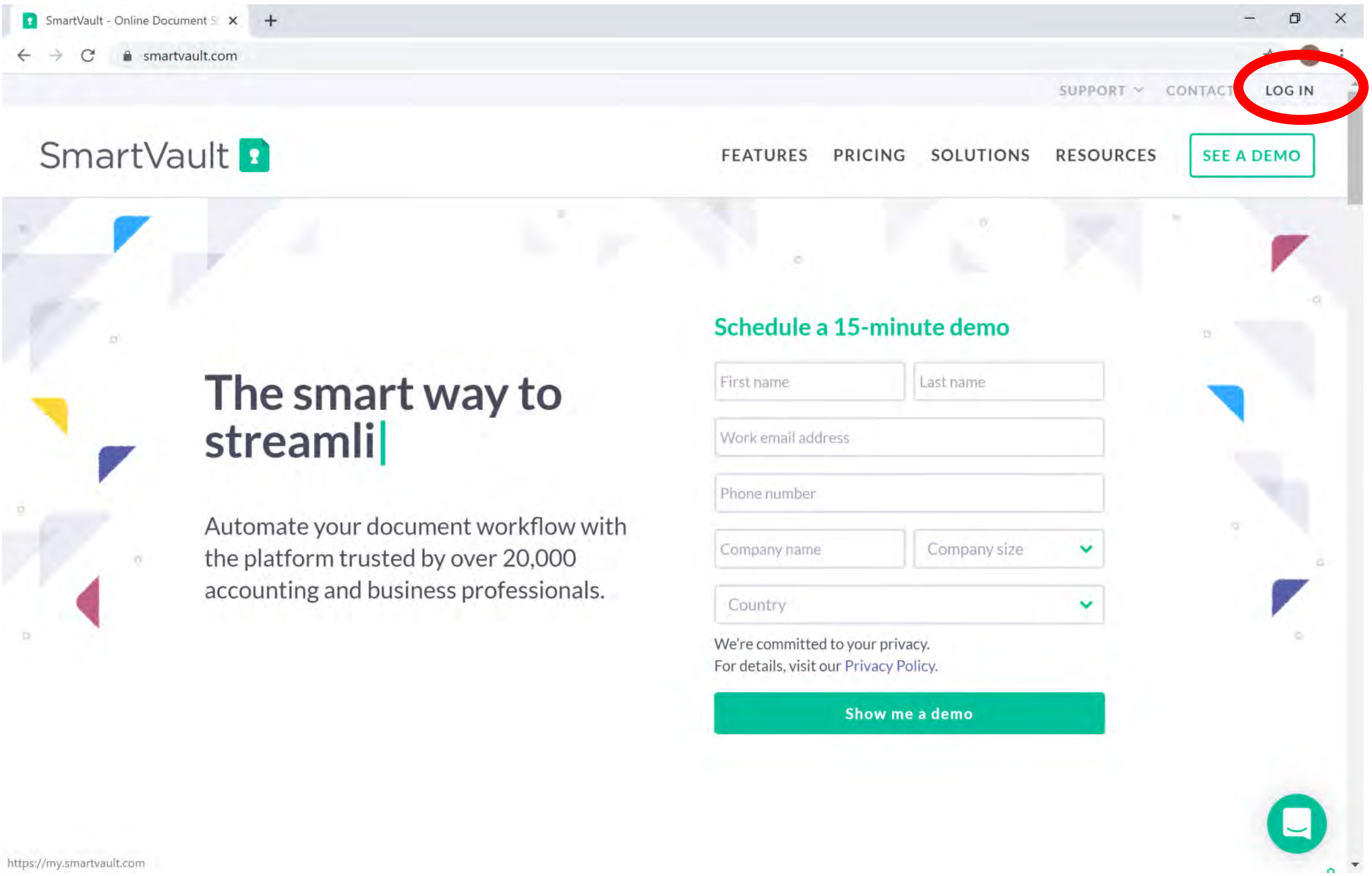
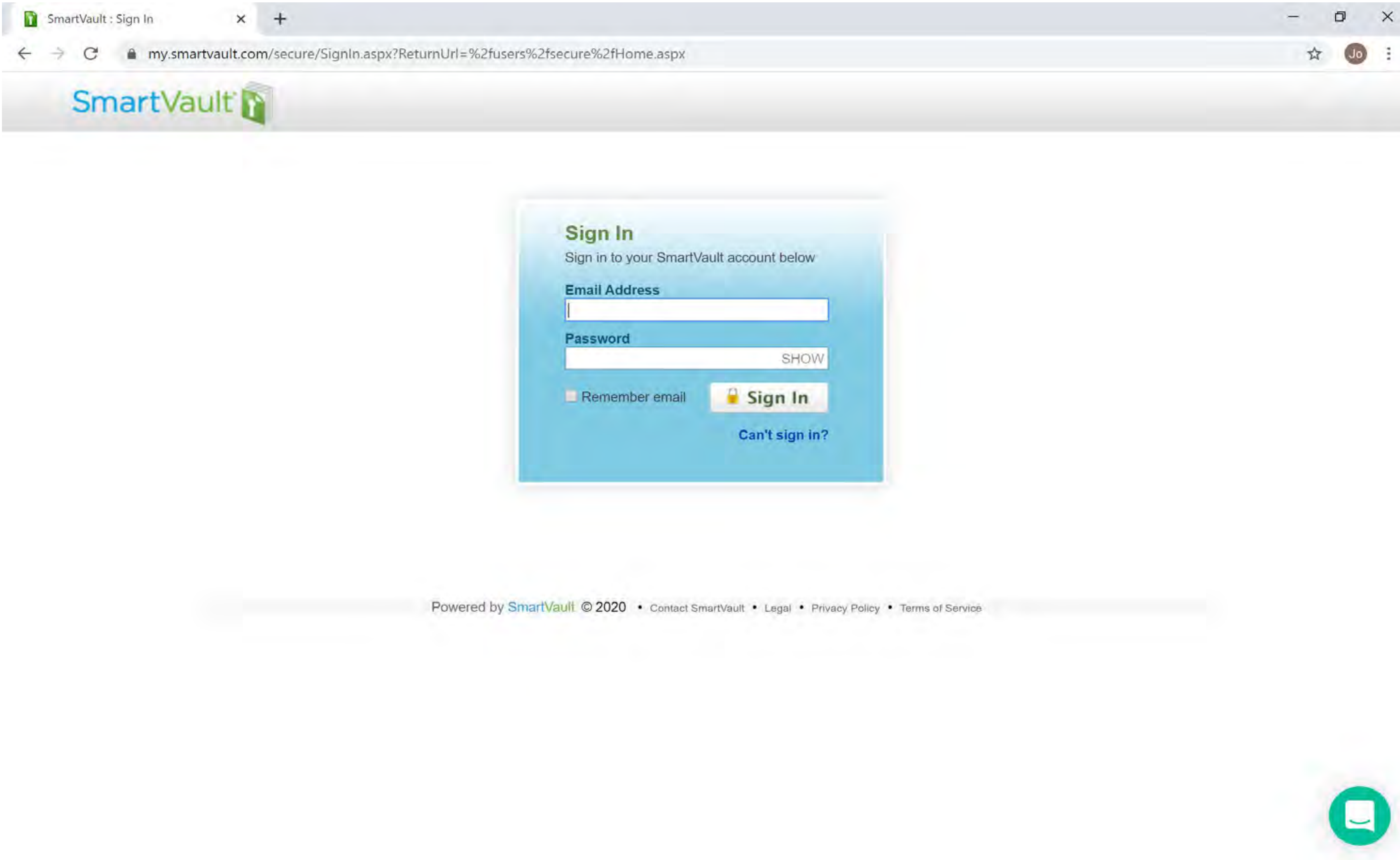
Step-by-Step Guide through the SMARTVAULT portal

This is a guide for all new users and current users of SmartVault. Current users should follow the normal login steps; new users should have received an invite link via email and should just click that link to complete set-up. If you can't find that link, please follow the 'can't sign in?' step below.

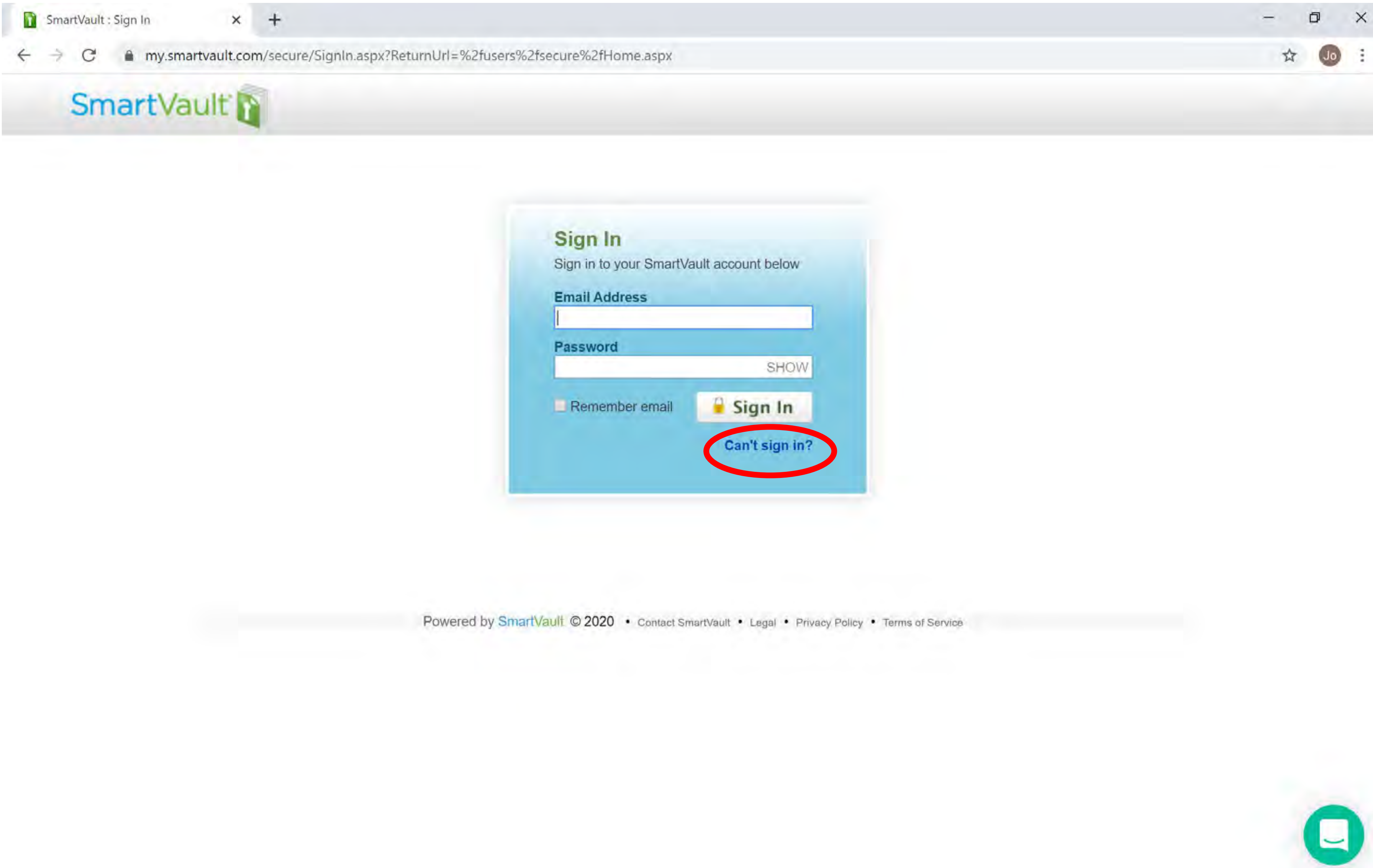
1) Go to www.smartvault.com
2) Top-left corner click 'LOGIN'



3) Login to your account using your email and password. (your email address has to be the one you provided to The Accountancy; the password was/needs to be set by you)

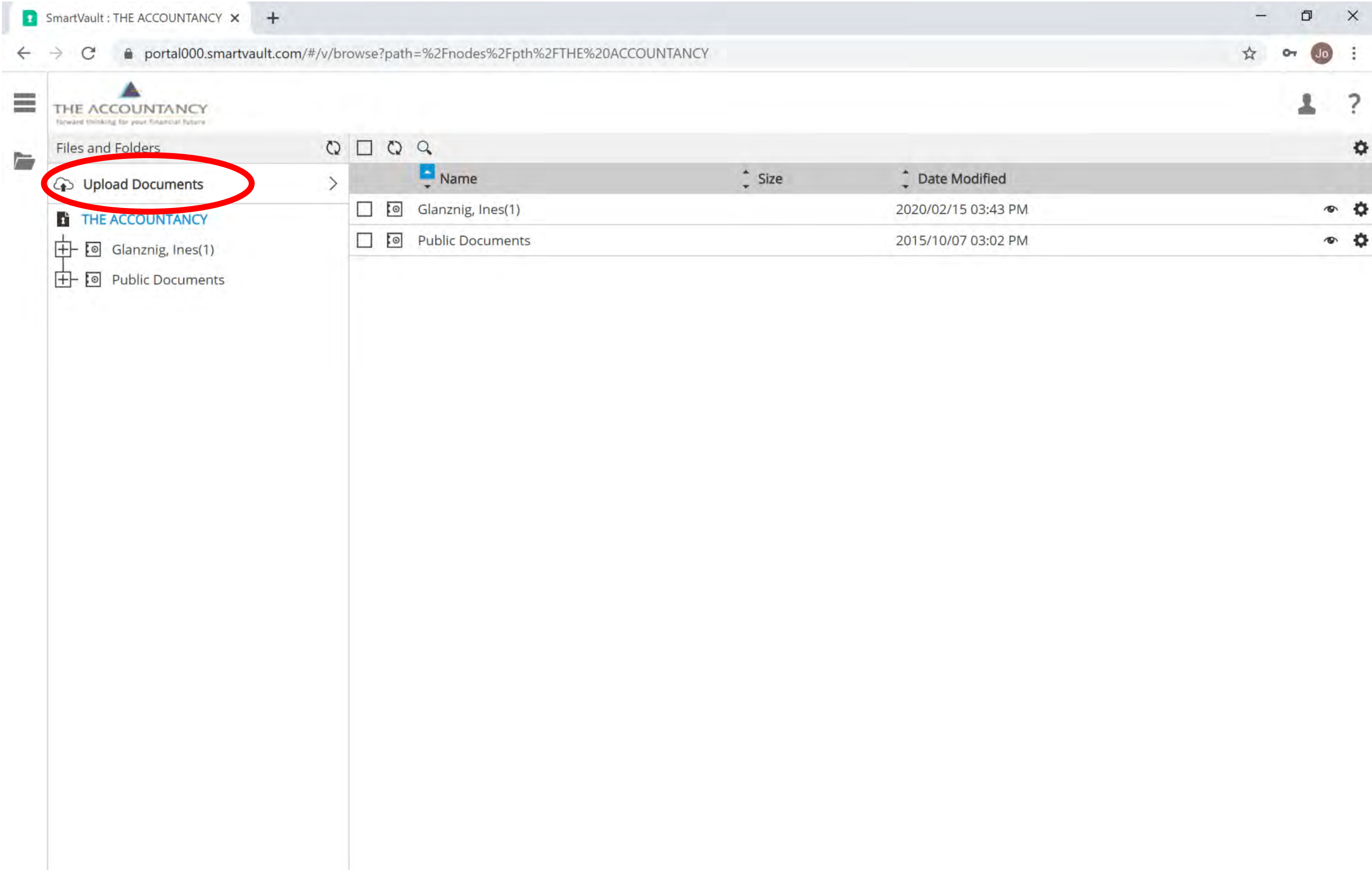


If you forgot your password, please reset it, clicking the 'Can't Sign in?' button



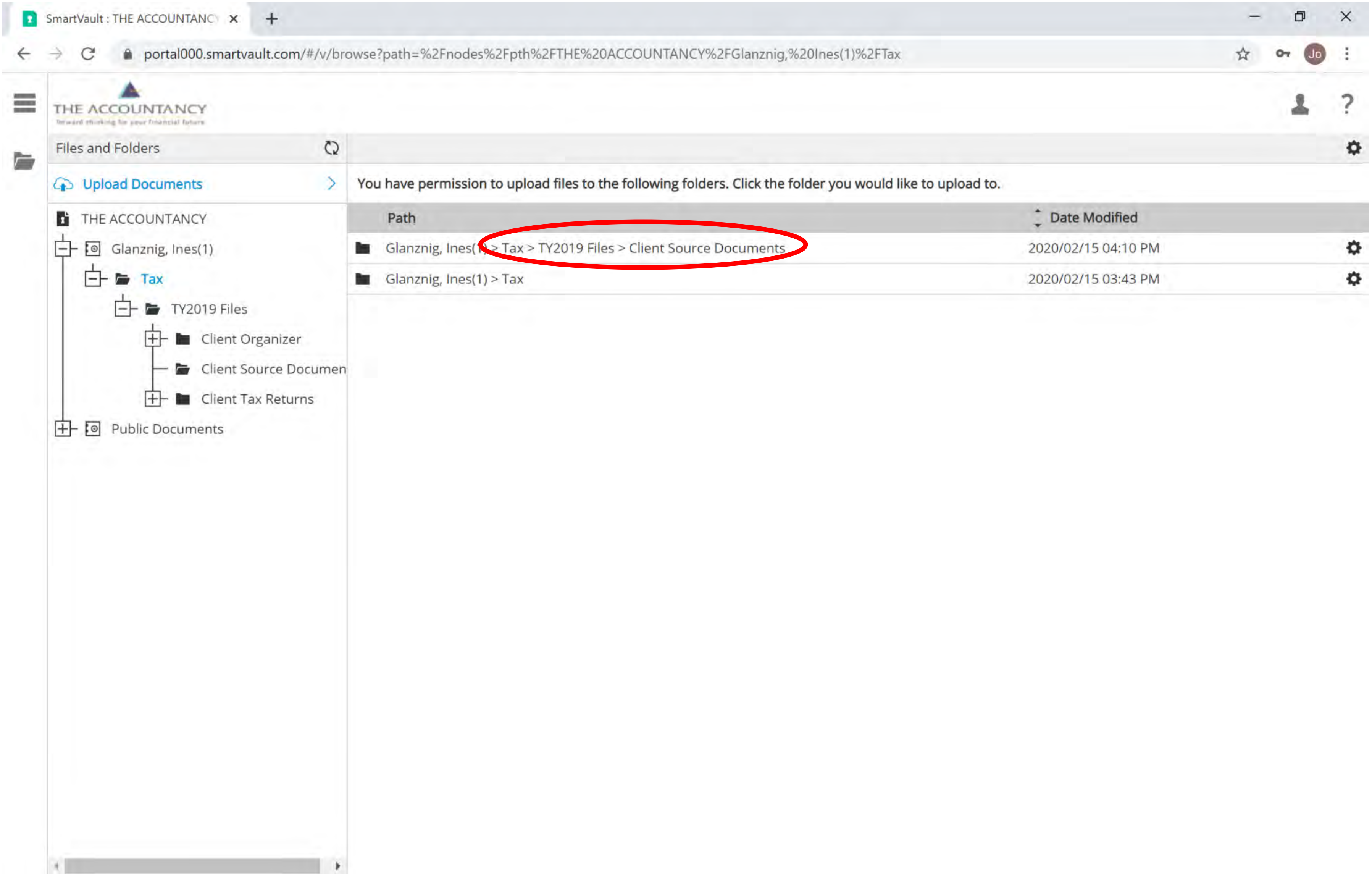
4) Once logged in you will see your account. On the left-hand side is a column at the top is an 'UPLOAD' button and below you can see your file and subfiles. (depending on which browser you use this view might be slightly different; this is the view with Google Chrome).

5) To UPLOAD files:

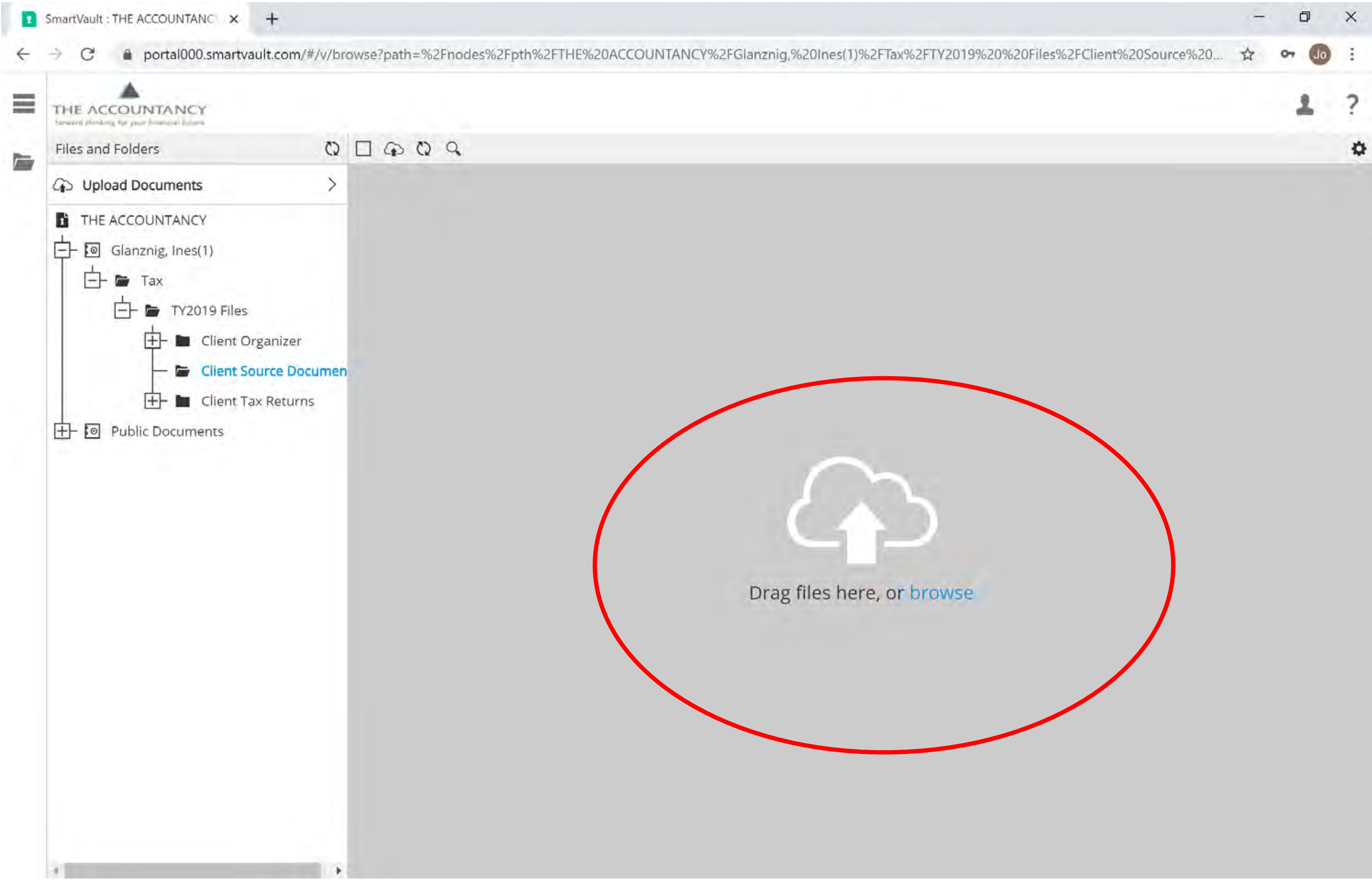


- Click 'Upload Documents'

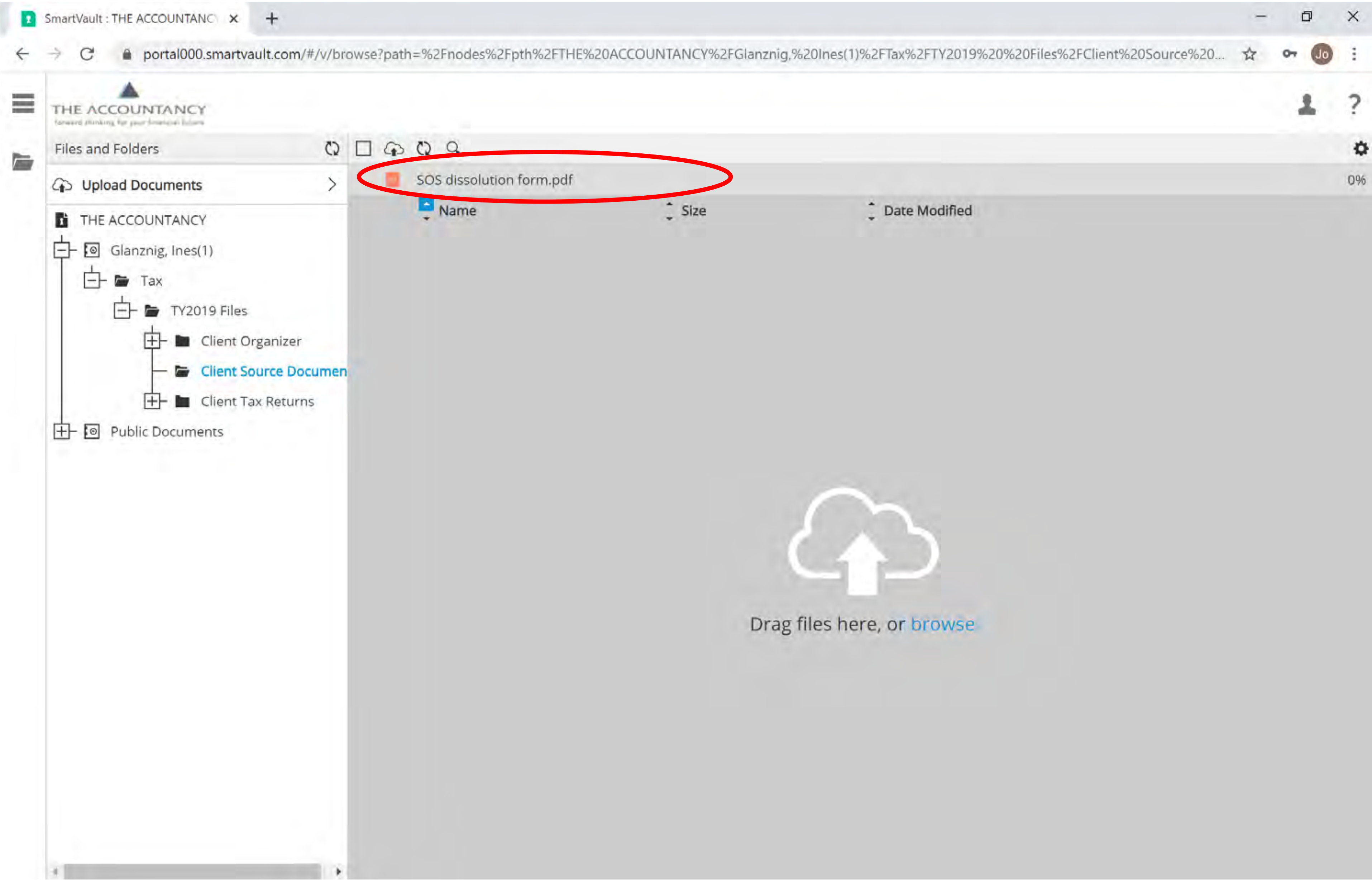
- You will be given an option of files that you can upload into (please pick the file with your name and the correct tax year)



- Once the section is open you can upload your file via a ‘Drag& Drop’ or standard ‘Browse’ option

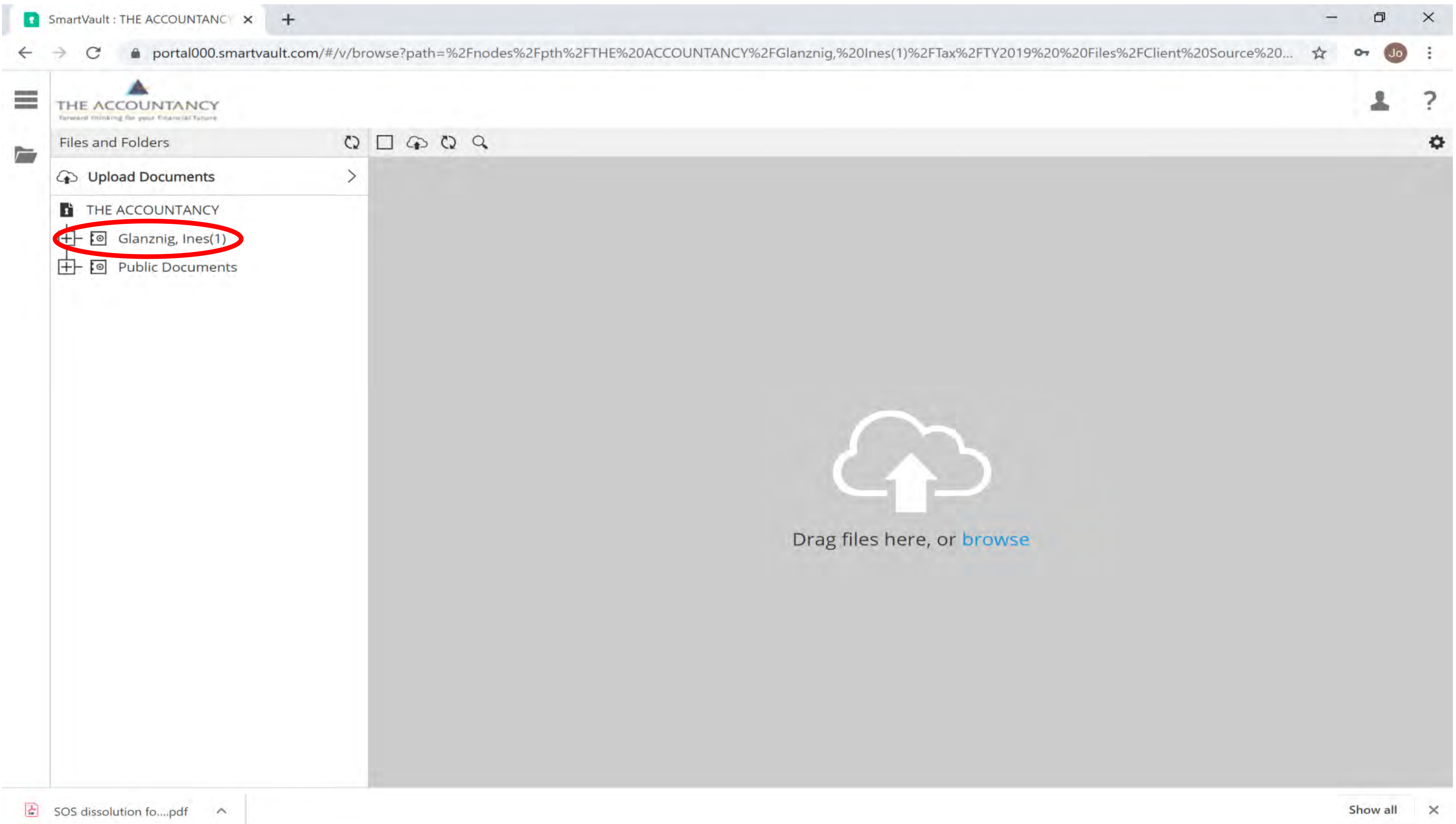


- Once you've dragged your file over it will appear at the top of the grey field
- There is no extra step needed. The file is now in the vault and The Accountancy gets notified that you have uploaded a file.

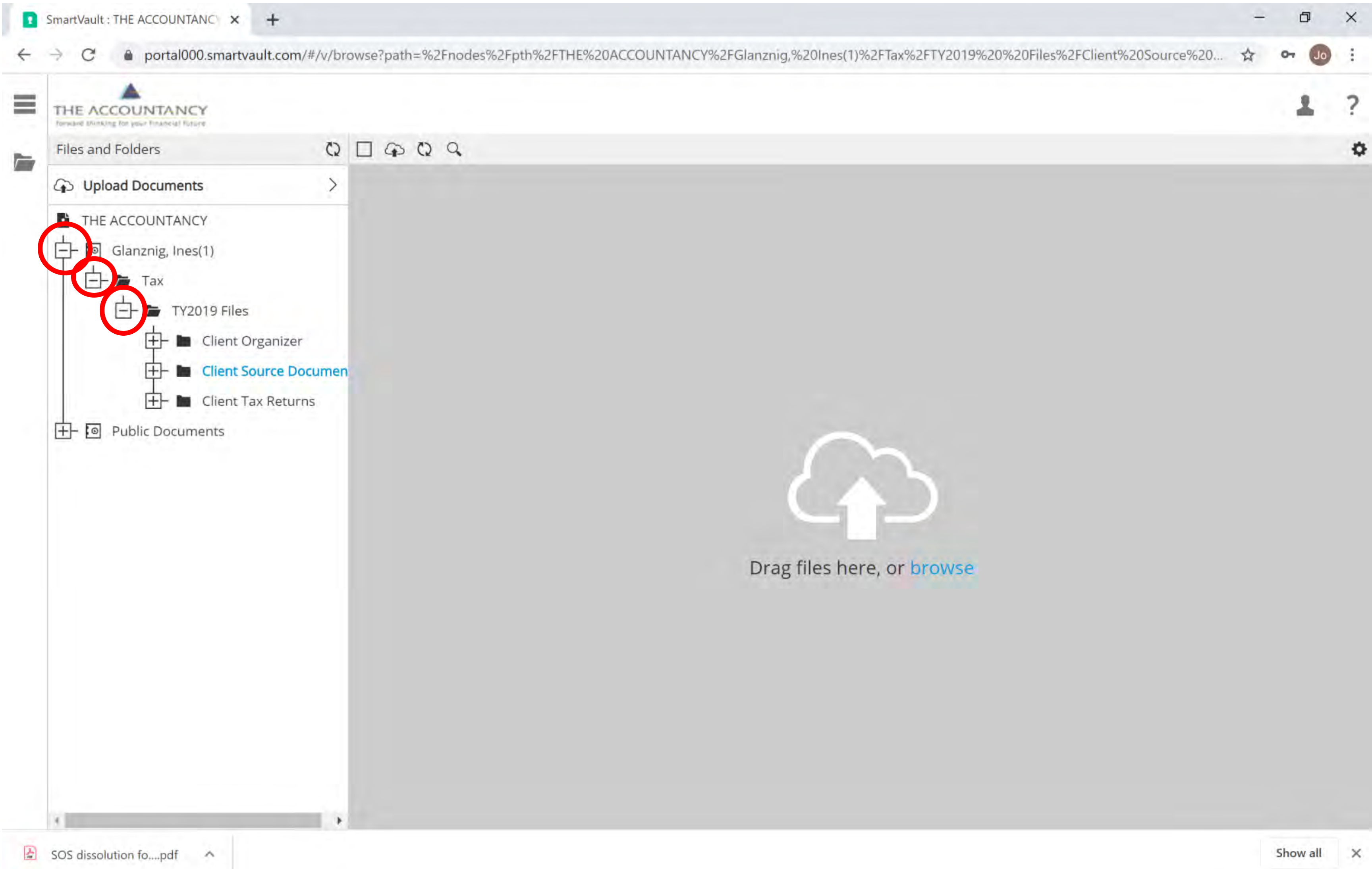


- The uploaded file shows above in red;

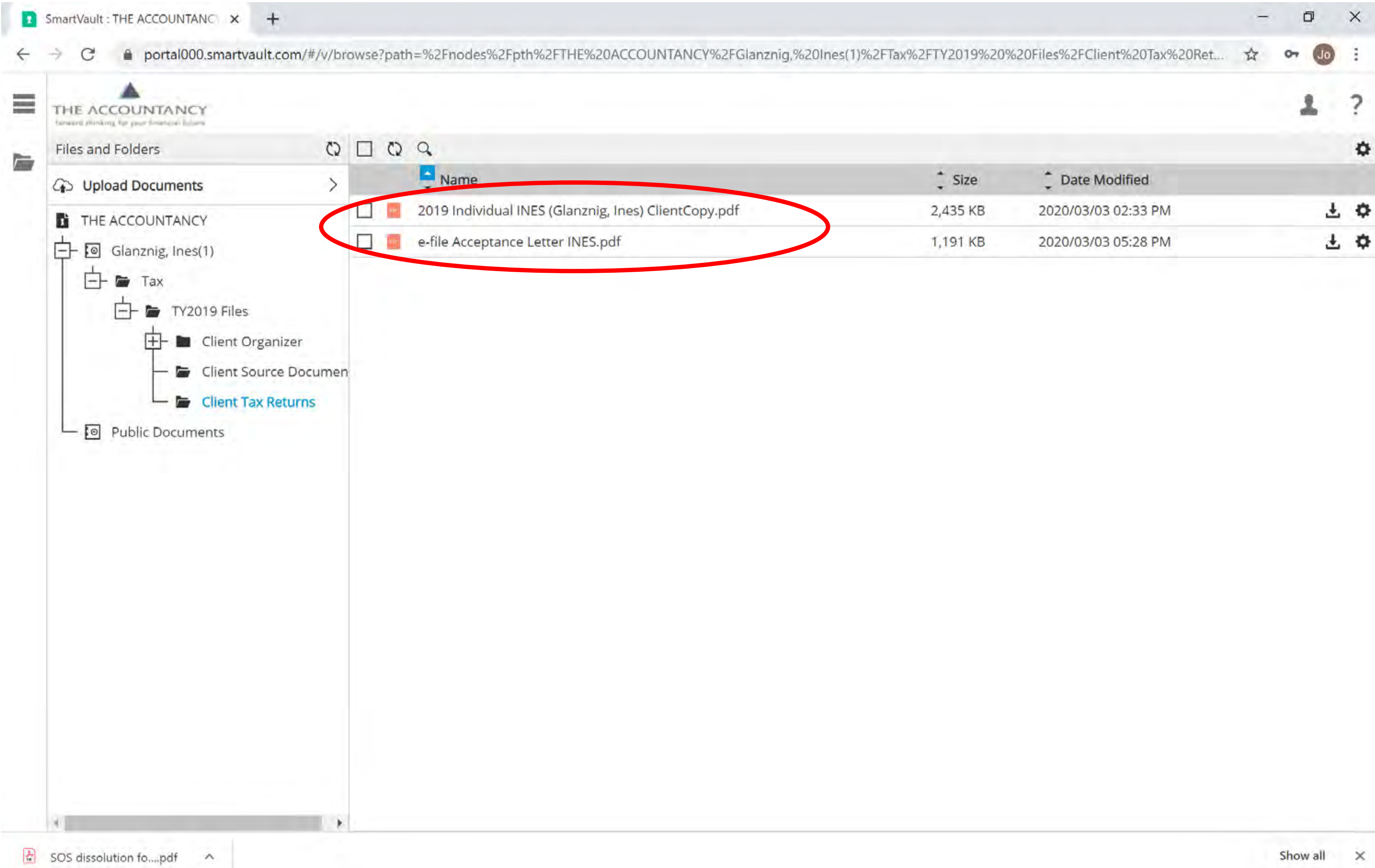
6) To DOWNLOAD files from your account follow these steps…
   - Log into account
   - In the left-hand side column below the 'upload' button is a list of your file and subfiles
   - Select the file with 'your name' (not the 'public file)



- Click the little '+' symbol to open that folder - Continue clicking the '+' symbol to open all folders until you reach the one you need to download from. (in this sample I only have a 2019 tax folder 'TY2019' which I will open)
- Once TY2019 is open there are 3 choices: - **Client organizer** (unless you have requested a pdf copy to be placed in your account, this section will be empty); **Client Source Documents** (holds all documents you have ever uploaded); and **Client Tax Return** (holds your copy of your tax return as well as the IRS acceptance letter once it has been filed)



-most people would want access to their tax return (in my case there is only the 2019 tax return and the IRS e-file acceptance letter available)



- Once you can see the file you need, simply check the box next to it and click the 'download' button above to download it to your computer