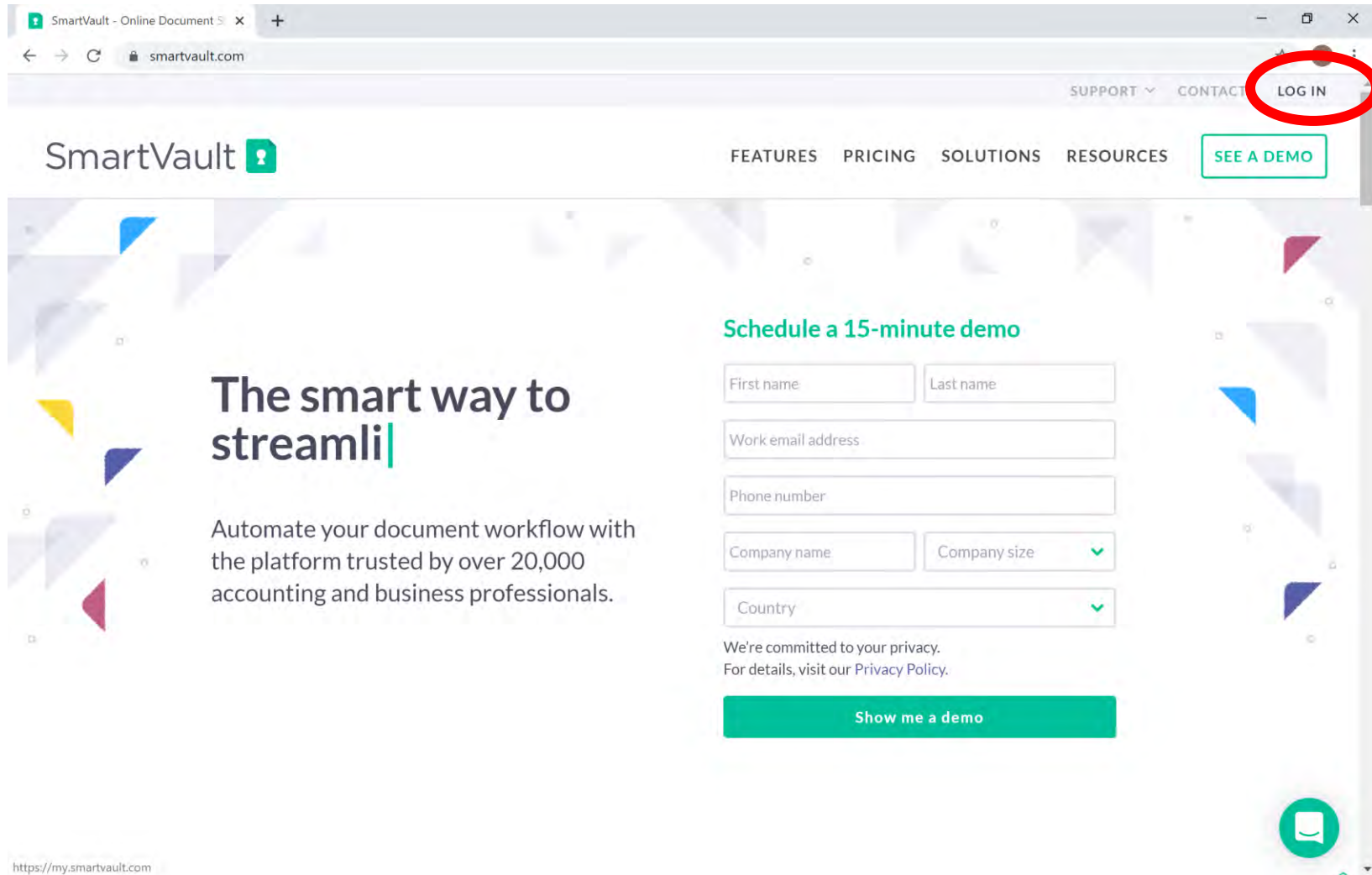


## Step-by-Step Guide through the SMARTVAULT portal

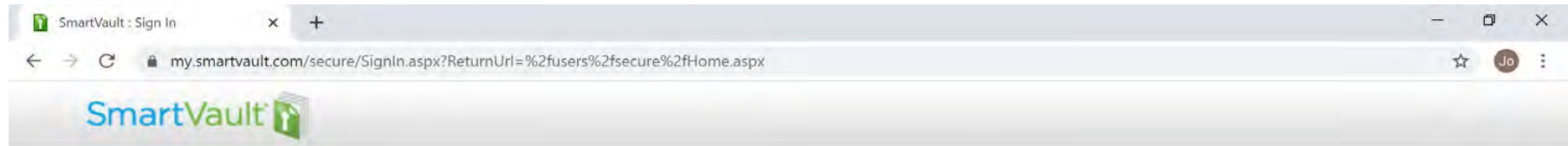
This is a guide for all new users and current users of SmartVault. Current users should follow the normal login steps; new users should have received an invite link via email and should just click that link to complete set-up. If you can't find that link, please follow the 'can't sign in?' step below.

- 1) Go to [www.smartvault.com](http://www.smartvault.com)
- 2) Top-left corner click 'LOGIN'

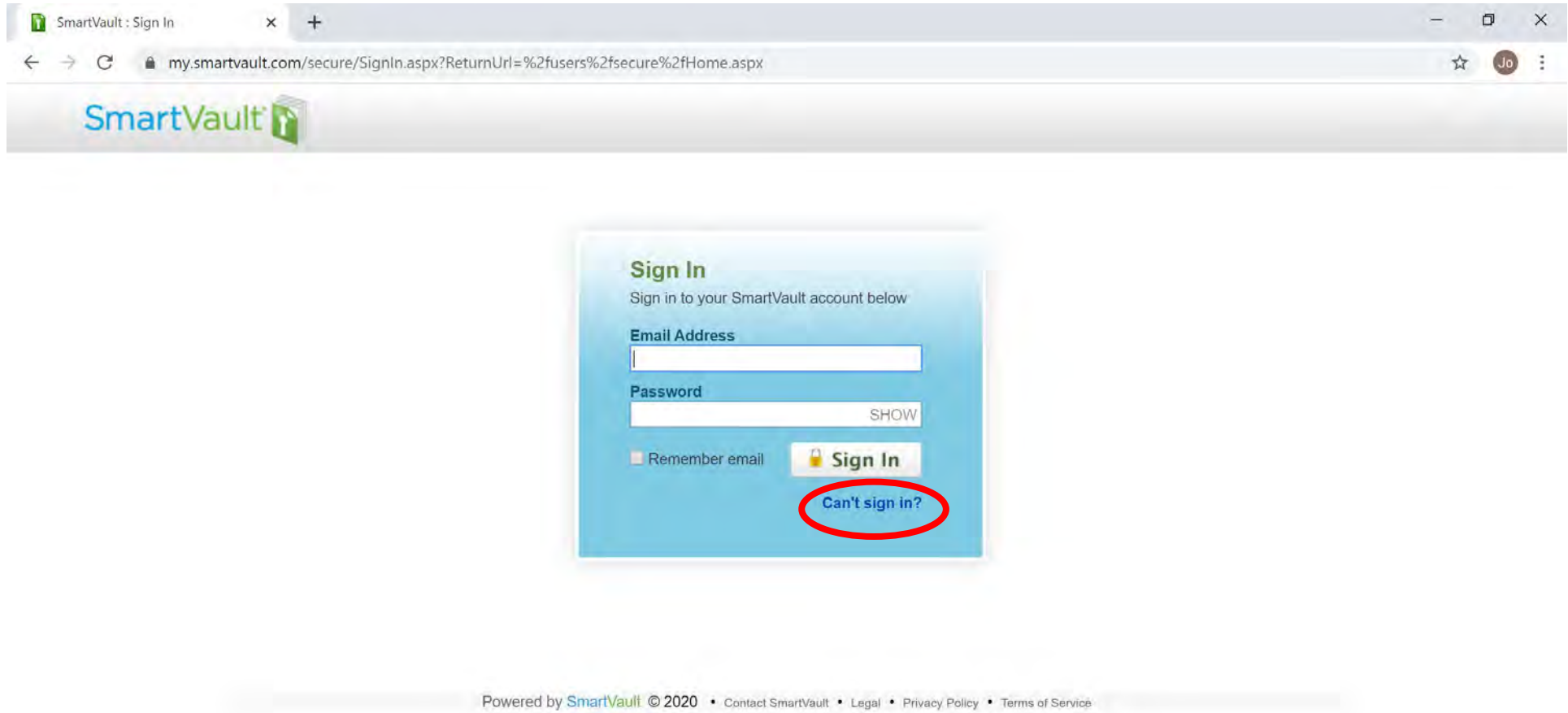


The screenshot shows the SmartVault website homepage. The browser address bar displays "smartvault.com". In the top right corner of the website, the "LOG IN" link is circled in red. Below the navigation bar, there is a "SEE A DEMO" button. The main content area features the headline "The smart way to streamli|" and a sub-headline "Automate your document workflow with the platform trusted by over 20,000 accounting and business professionals." To the right, there is a "Schedule a 15-minute demo" form with fields for First name, Last name, Work email address, Phone number, Company name, Company size, and Country. A "Show me a demo" button is located at the bottom of the form. A privacy notice states "We're committed to your privacy. For details, visit our Privacy Policy." A chat icon is visible in the bottom right corner.

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:

The screenshot shows a web browser window with the URL `portal000.smartvault.com/#/v/browse?path=%2Fnodes%2Fpth%2Fthe%20accountancy`. The page displays the 'THE ACCOUNTANCY' logo and a 'Files and Folders' sidebar. In the sidebar, the 'Upload Documents' button is circled in red. The main content area shows a table of files and folders:

Name	Size	Date Modified
Glanzrig, Ines(1)		2020/02/15 03:43 PM
Public Documents		2015/10/07 03:02 PM

- Click 'Upload Documents'

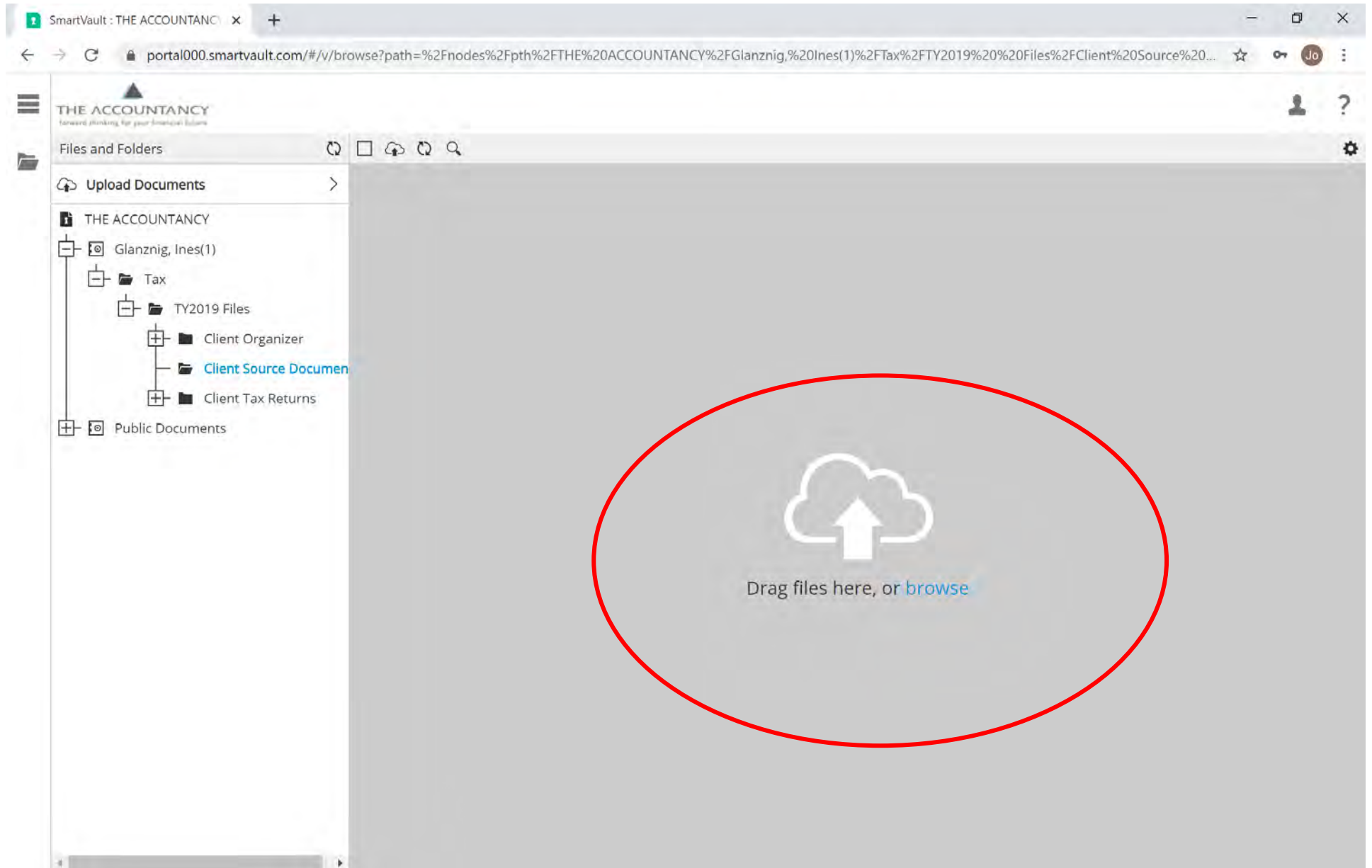
- You will be given an option of files that you can upload into (please pick the file with your name and the correct tax year)

The screenshot shows a web browser window with the URL `portal000.smartvault.com/#/v/browse?path=%2Fnodes%2Fpth%2Fthe%20accountancy%2Fglanznig,%20ines(1)%2ftax`. The page title is "SmartVault : THE ACCOUNTANCY". The main content area is titled "Files and Folders" and displays a message: "You have permission to upload files to the following folders. Click the folder you would like to upload to." Below this message is a table with two columns: "Path" and "Date Modified". The table lists two folders:

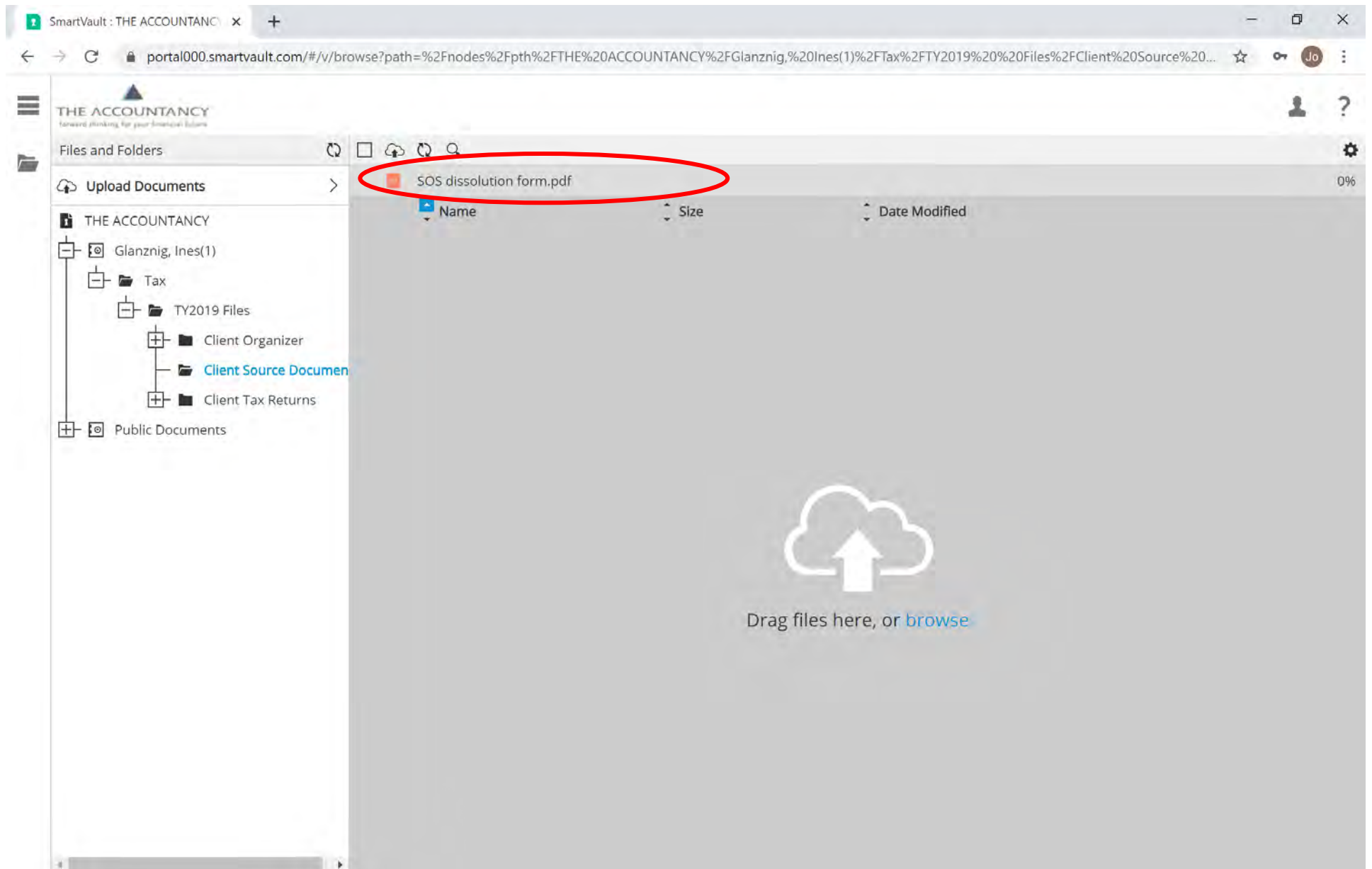
Path	Date Modified
Glanznic, Ines(1) > Tax > TY2019 Files > Client Source Documents	2020/02/15 04:10 PM
Glanznic, Ines(1) > Tax	2020/02/15 03:43 PM

The folder path "Glanznic, Ines(1) > Tax > TY2019 Files > Client Source Documents" is circled in red. On the left side of the screen, a file tree shows the hierarchy: "THE ACCOUNTANCY" > "Glanznic, Ines(1)" > "Tax" > "TY2019 Files" > "Client Organizer", "Client Source Documents", and "Client Tax Returns". There is also a "Public Documents" folder at the bottom of the tree.

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



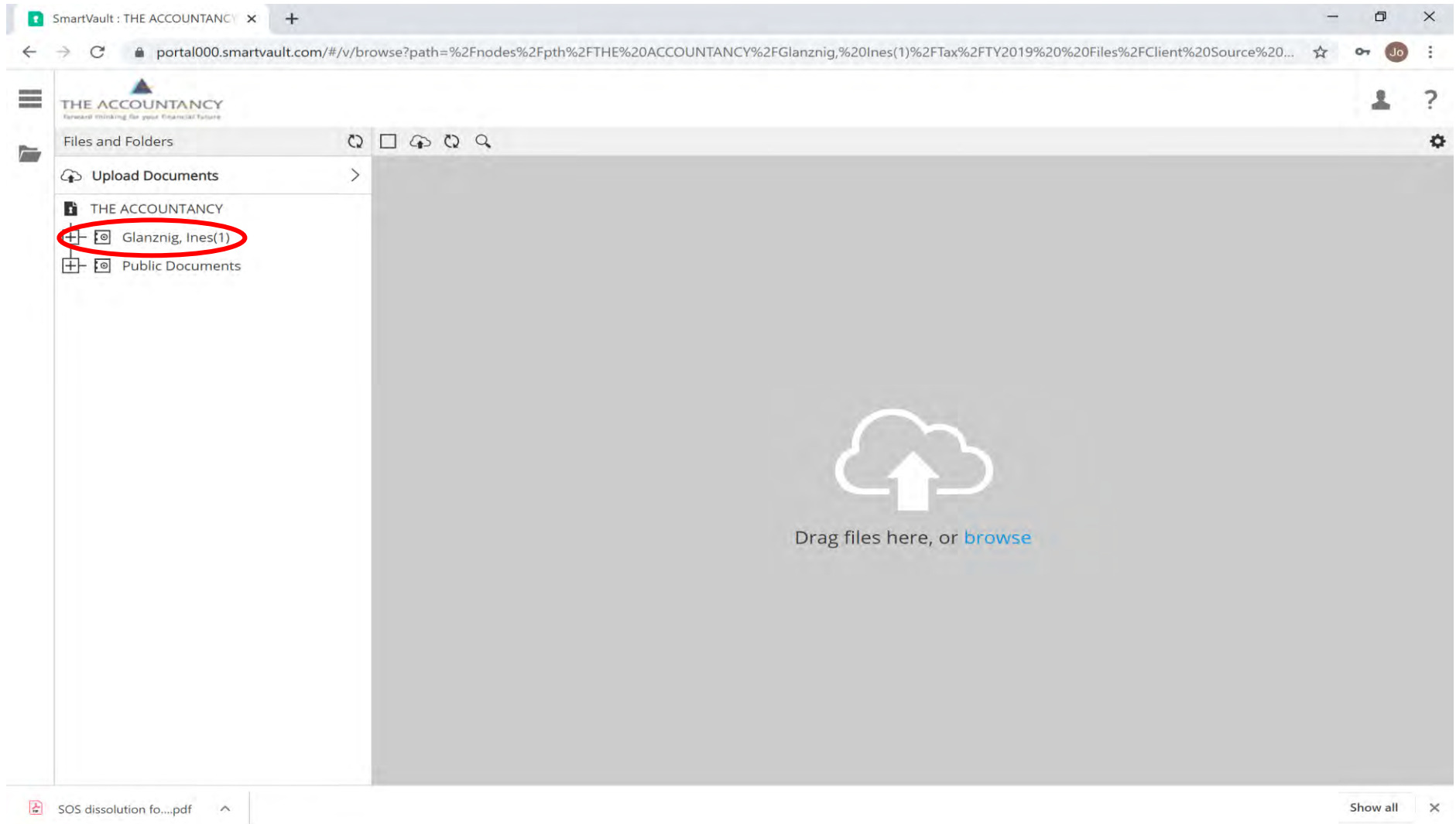
- Once you've dragged your file over it will appear at the top of the grey field
- There is no extra step needed. The file is now in the vault and The Accountancy gets notified that you have uploaded a file.



- The uploaded file shows above in red;

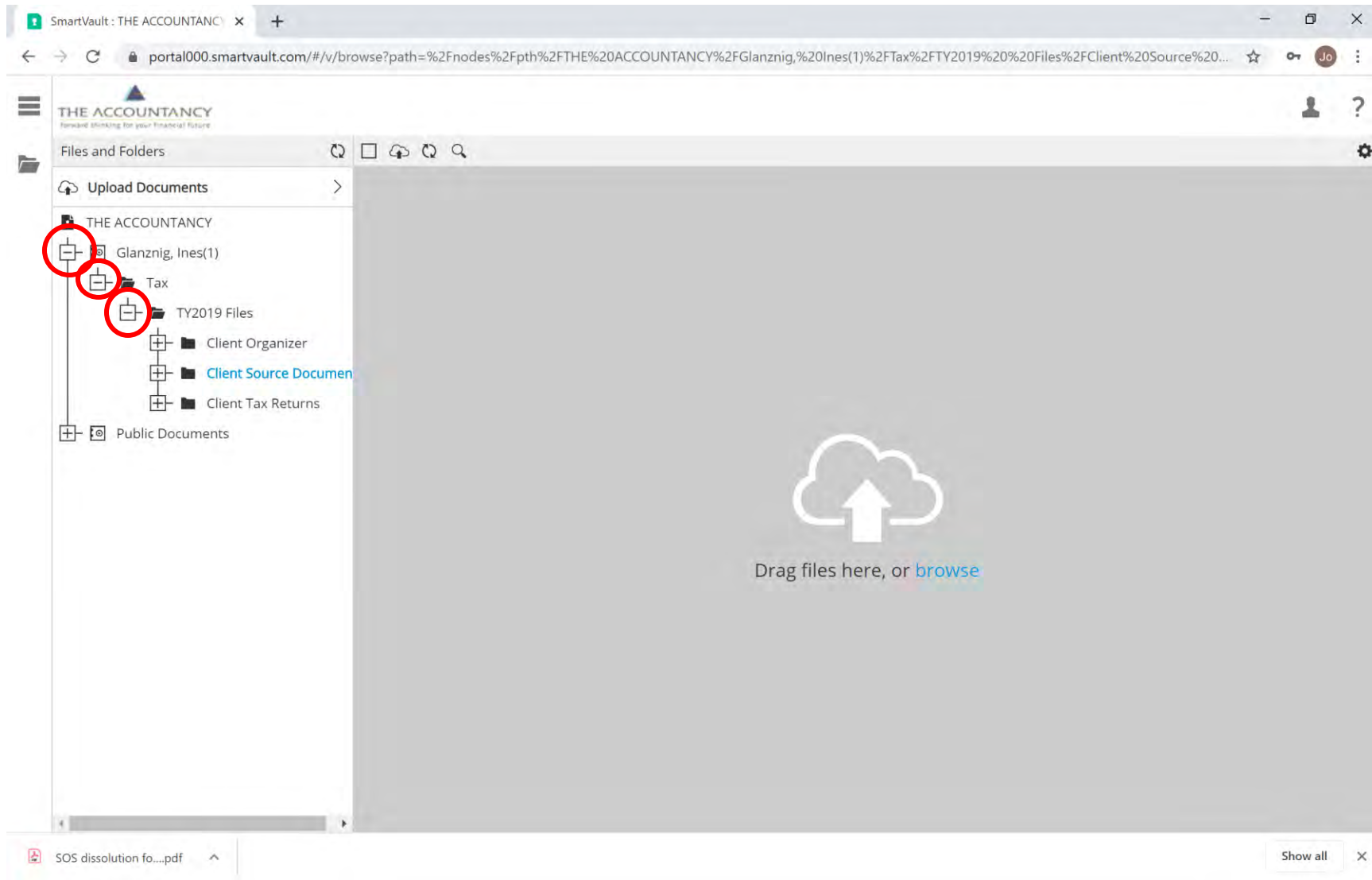
6) To DOWNLOAD files from your account follow these steps...

- 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)

The screenshot shows a web browser window displaying the SmartVault interface for 'THE ACCOUNTANCY'. The left sidebar shows a folder structure: 'THE ACCOUNTANCY' > 'Glanzbig, Ines(1)' > 'Tax' > 'TY2019 Files' > 'Client Organizer' > 'Client Source Document' > 'Client Tax Returns'. The main area shows a file list with columns for Name, Size, and Date Modified. Two files are circled in red:

Name	Size	Date Modified
2019 Individual INES (Glanzbig, Ines) ClientCopy.pdf	2,435 KB	2020/03/03 02:33 PM
e-file Acceptance Letter INES.pdf	1,191 KB	2020/03/03 05:28 PM

At the bottom of the browser window, a PDF file 'SOS dissolution fo...pdf' is open in a separate tab. A 'Show all' button is visible in the bottom right corner.

- 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

The screenshot shows the SmartVault web interface. The browser address bar displays the URL: `portal000.smartvault.com/#/v/browse?path=%2Fnodes%2Fpth%2FTHE%20ACCOUNTANCY%2FGlanzign,%20Ines(1)%2FTax%2FTY2019%20%20Files%2FClient%20Tax%20Ret...`. The interface includes a navigation pane on the left with a tree view showing the folder structure: THE ACCOUNTANCY > Glanznig, Ines(1) > Tax > TY2019 Files > Client Tax Returns. The main content area shows a table of files with columns for Name, Size, and Date Modified. A 'Download the selected files' button is located above the table. The checkbox for the first file, '2019 Individual INES (Glanzign, Ines) ClientCopy.pdf', is checked, and both the checkbox and the download button are circled in red.

Name	Size	Date Modified
<input checked="" type="checkbox"/> 2019 Individual INES (Glanzign, Ines) ClientCopy.pdf	2,435 KB	2020/03/03 02:33 PM
<input type="checkbox"/> e-file Acceptance Letter INES.pdf	1,191 KB	2020/03/03 05:28 PM

At the bottom of the interface, there is a download bar showing a file named 'SOS dissolution fo...pdf' and a 'Show all' button.