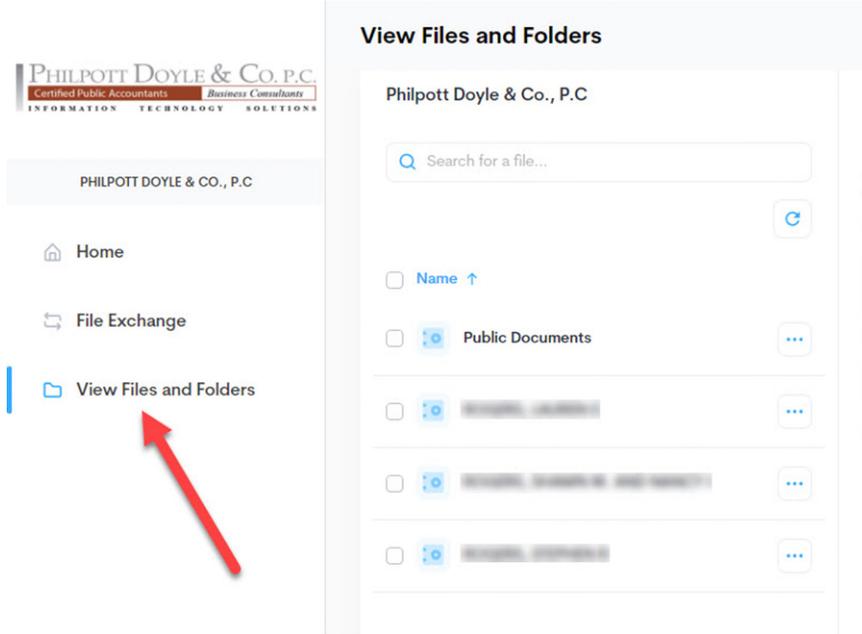
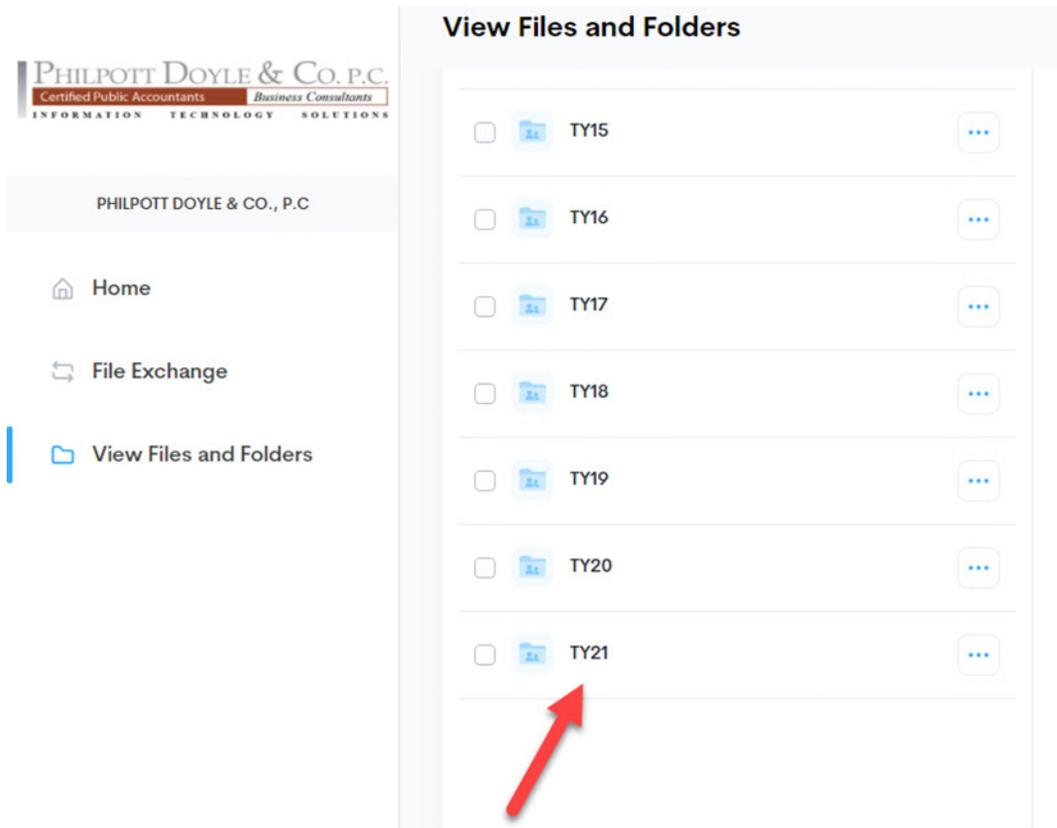


HOW TO UPLOAD FILES TO YOUR SMARTVAULT

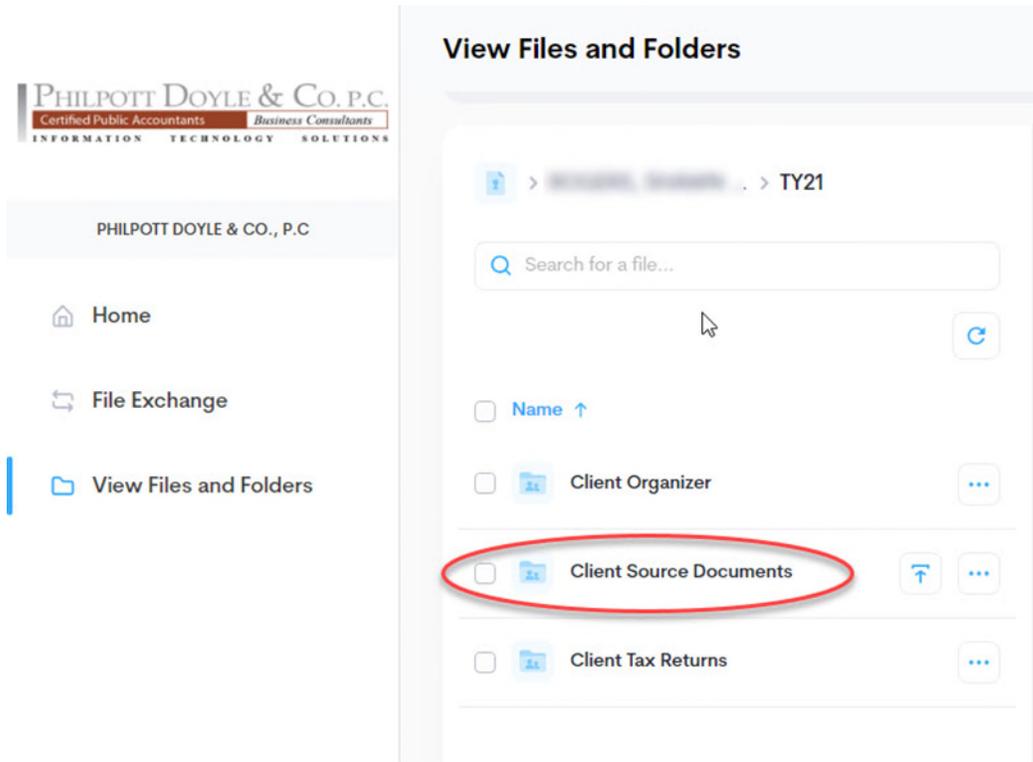
Login to your account. At your home page screen, select “View Files and Folders” . If you are linked to more than one account, select the account you want to use on the right.



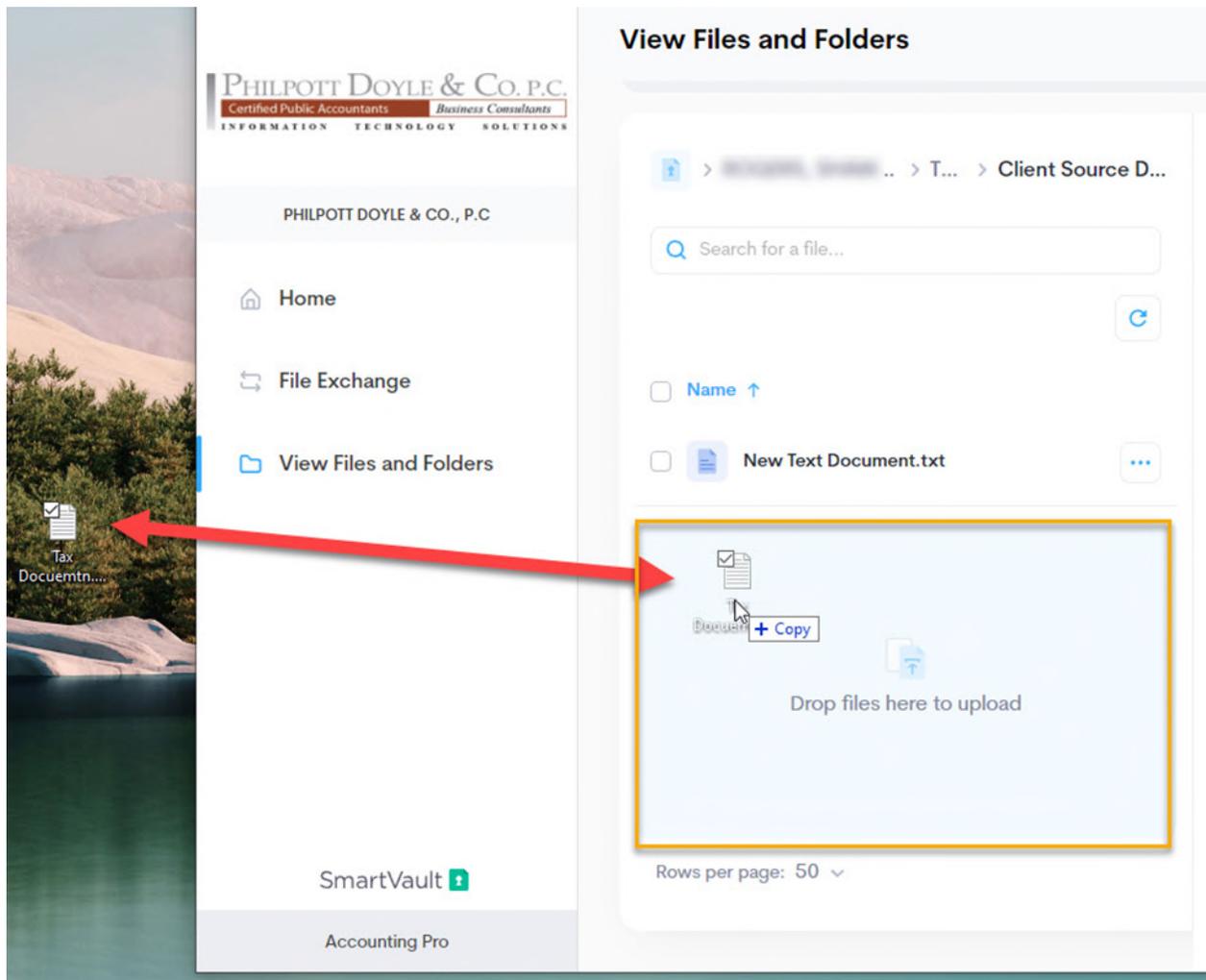
On the next screen, select the tax year you'd like to upload documents to. In this case, the tax year 2021 is selected



Within the tax year you have selected, there will be several different folders displayed. You want to upload your source documents to the “Client Source Documents” folder. Select that folder as displayed below.

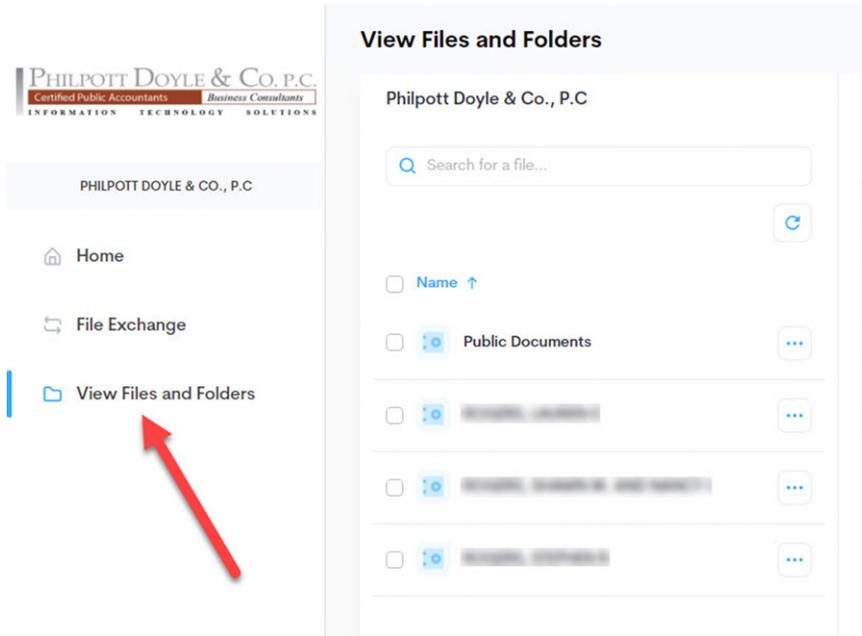


For the last step, drag the documents you want to upload to the blue box that will appear under the “View Files and Folders” screen.

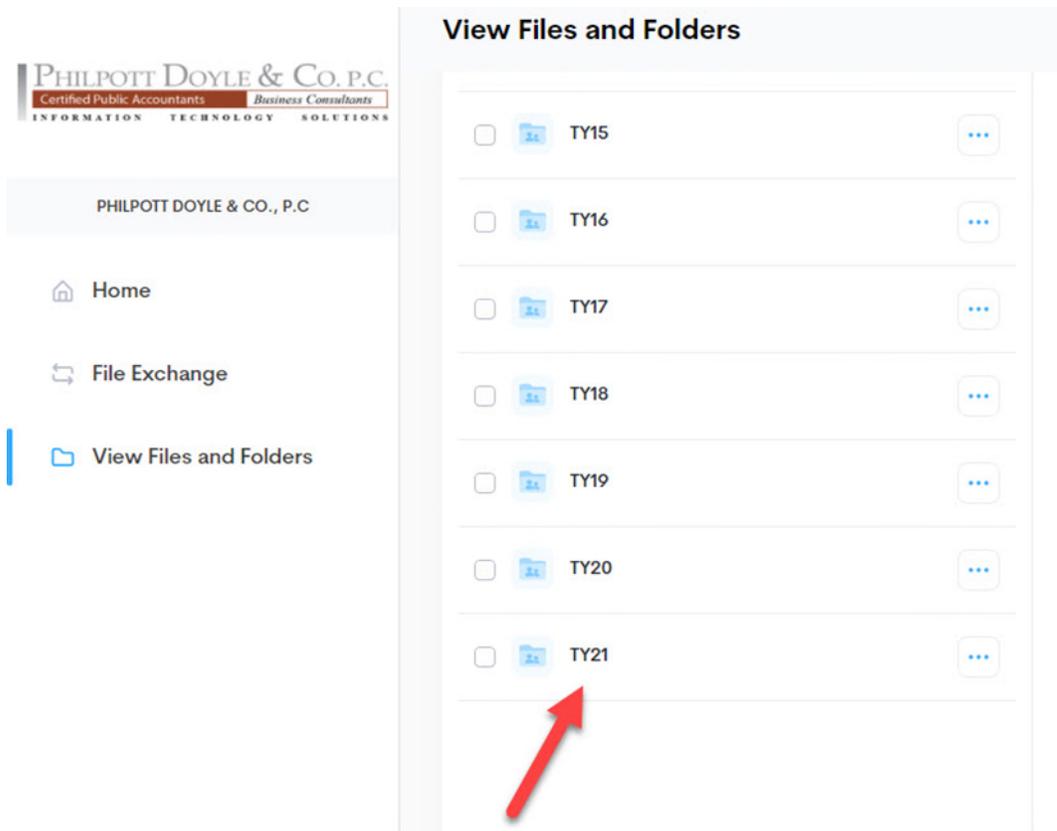


HOW TO DOWNLOAD FILES FROM YOUR SMARTVAULT

Login to your account. At your home page screen, select “View Files and Folders” . If you are linked to more than one account, select the account you want to use on the right.



On the next screen, select the tax year you'd like to upload documents to. In this case, the tax year 2021 is selected



Within the tax year you have selected, there will be several different folders displayed. You want to upload your source documents to the "Client Tax Returns" folder. Select that folder as displayed below.

The screenshot shows the 'View Files and Folders' interface for the year 'TY20'. The left sidebar contains the company logo 'PHILPOTT DOYLE & CO. P.C.' and navigation links for 'Home', 'File Exchange', and 'View Files and Folders'. The main content area displays a list of folders: 'Client Organizer', 'Client Source Documents', and 'Client Tax Returns'. The 'Client Tax Returns' folder is circled in red, and a red arrow points to it. The interface includes a search bar and a table with columns for 'Name' and 'Last Modified'.

<input type="checkbox"/>	Name ↑	Last Modified	
<input type="checkbox"/>	Client Organizer	Dec 9 2020	...
<input type="checkbox"/>	Client Source Documents	Dec 9 2020	↑ ...
<input type="checkbox"/>	Client Tax Returns	Dec 9 2020	...

The tax documents that have been uploaded will be displayed. Select the documents you want to download and press the Download button as shown below. A window will then pop up asking where you would like to save the files on your computer.

Please note that if you have pop up blocking turned on in your browser, you will need to download each file individually as opposed to downloading them all at once.

The screenshot shows the 'View Files and Folders' interface for the year 'TY20' and the folder 'Client Tax Returns'. The left sidebar is the same as in the previous screenshot. The main content area displays a list of files: '2020 Individual ...:Y 1.) ClientCopy.pdf', '2020 Individual I ... GovernmentCopy.pdf', and 'e-file Acceptance Letterpdf'. The first two files are selected, indicated by blue checkmarks. A red arrow points to the selected files. On the right side, a '2 files selected' summary box is visible, and a blue 'Download' button is highlighted with a red box. The interface includes a search bar and a table with columns for 'Name' and 'Last Modified'.

<input type="checkbox"/>	Name ↑	Last Modified	
<input checked="" type="checkbox"/>	2020 Individual ...:Y 1.) ClientCopy.pdf	May 6 2021	...
<input checked="" type="checkbox"/>	2020 Individual I ... GovernmentCopy.pdf	May 6 2021	...
<input type="checkbox"/>	e-file Acceptance Letterpdf	May 8 2021	...