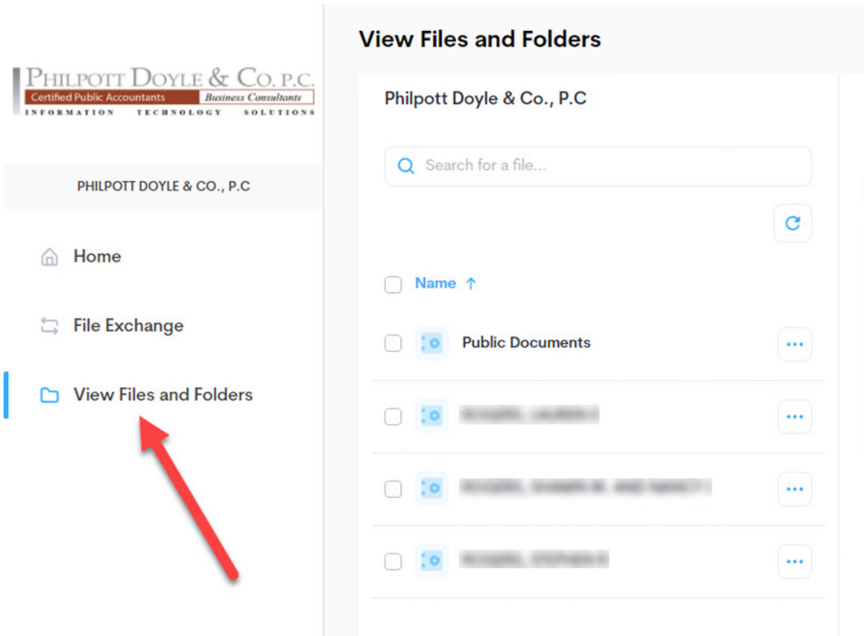
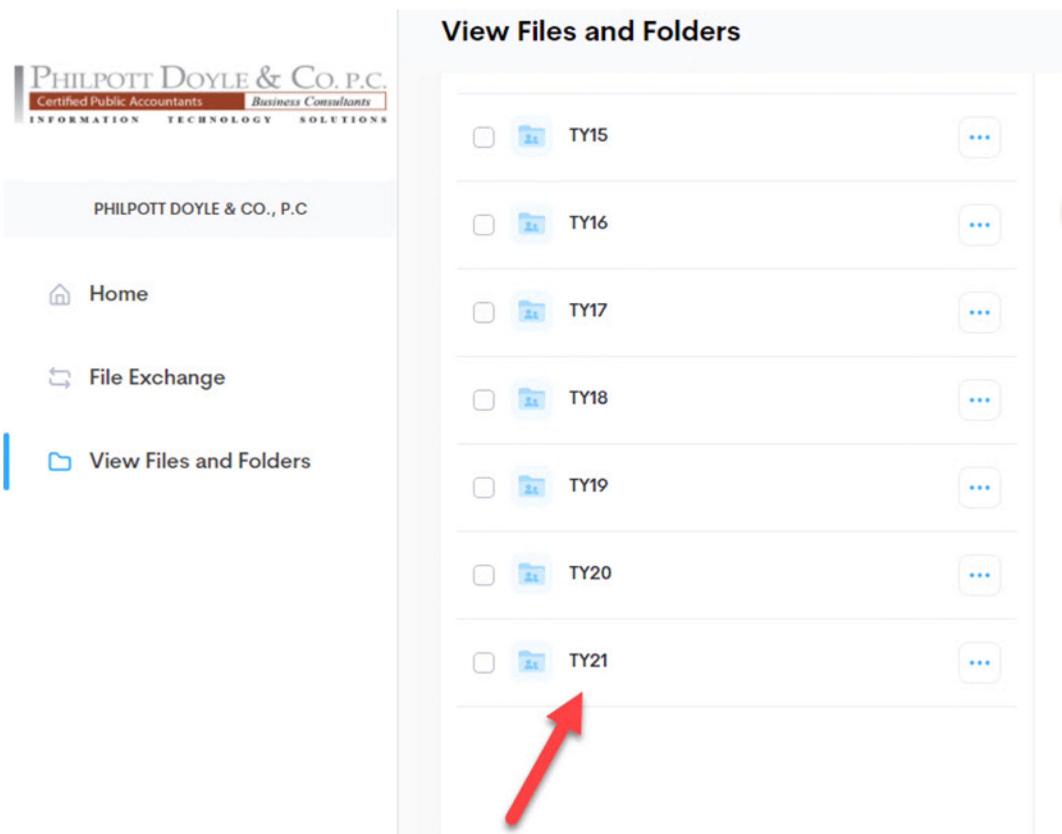
HOW TO UPLOAD FILES TO YOUR SMARTVAULT

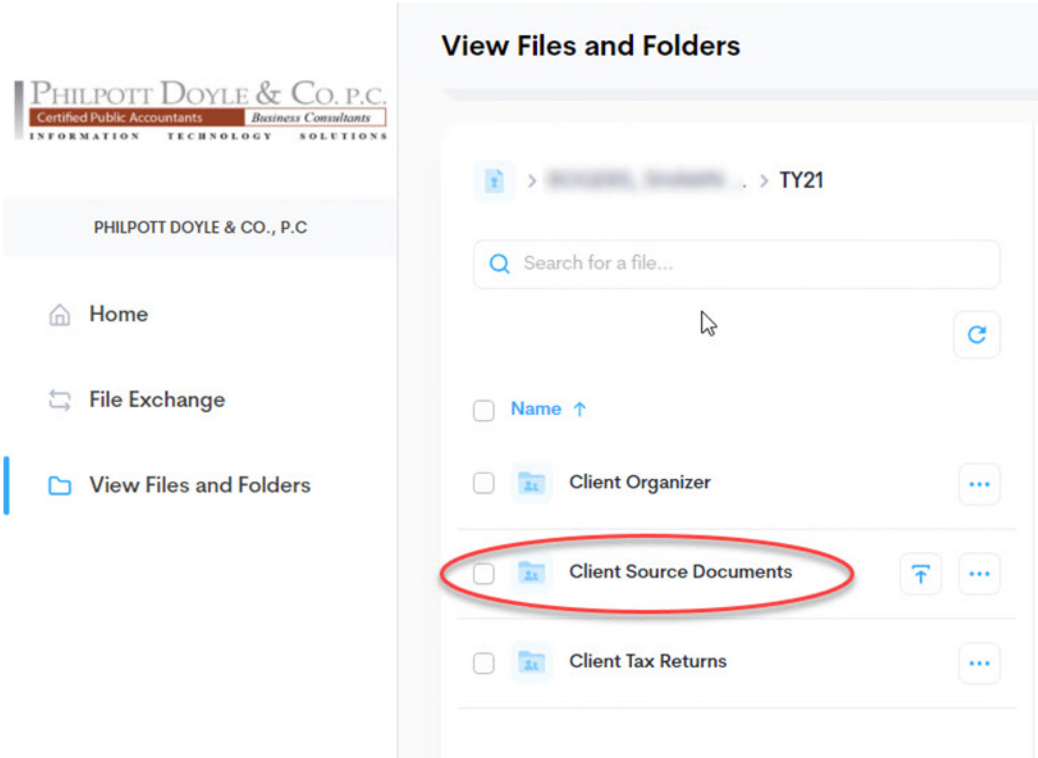
Login to your account. At your home page screen, select “View Files and Folders” . If you are linked to more than one account, select the account you want to use on the right.



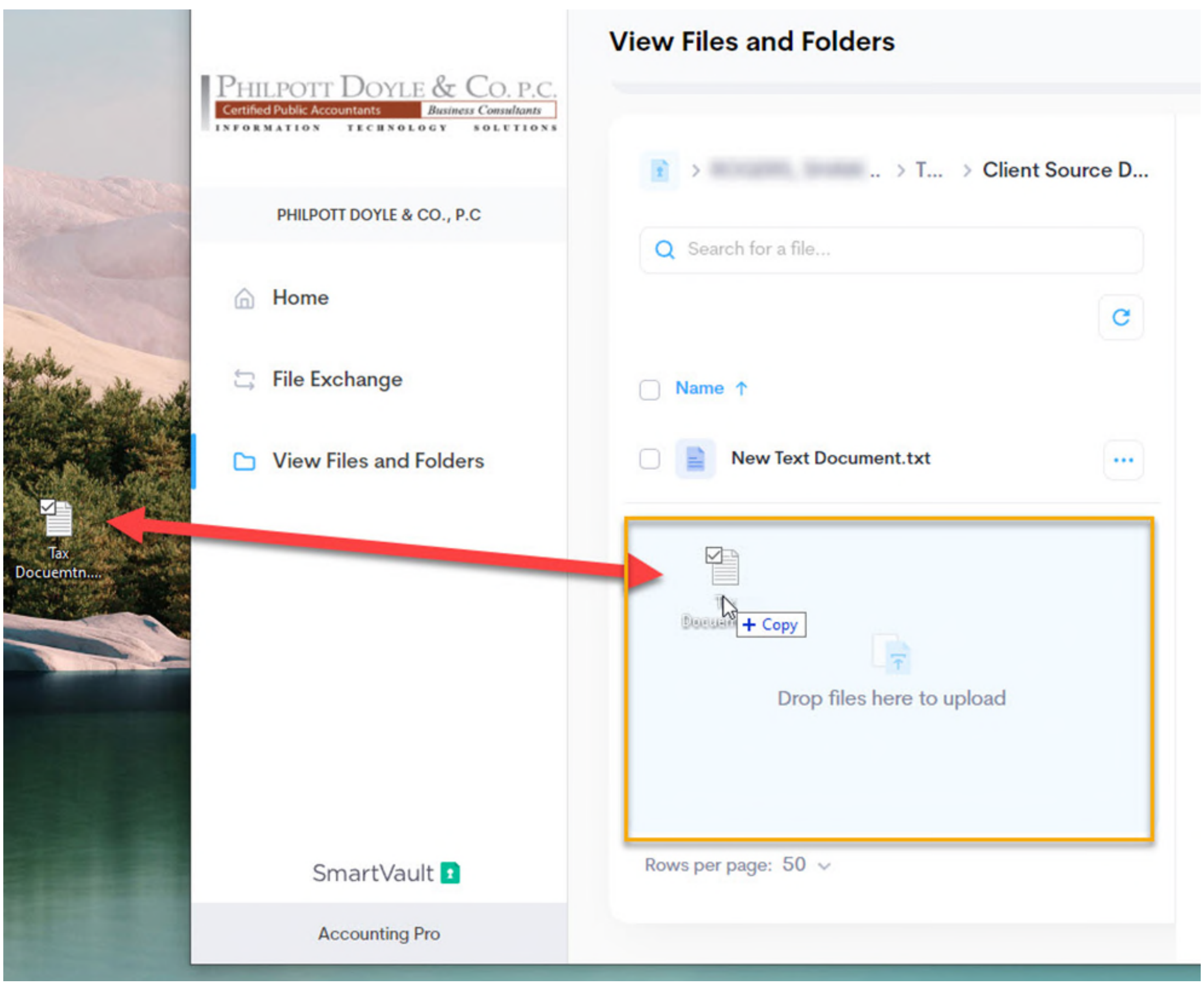
On the next screen, select the tax year you’d like to upload documents to. In this case, the tax year 2021 is selected



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.

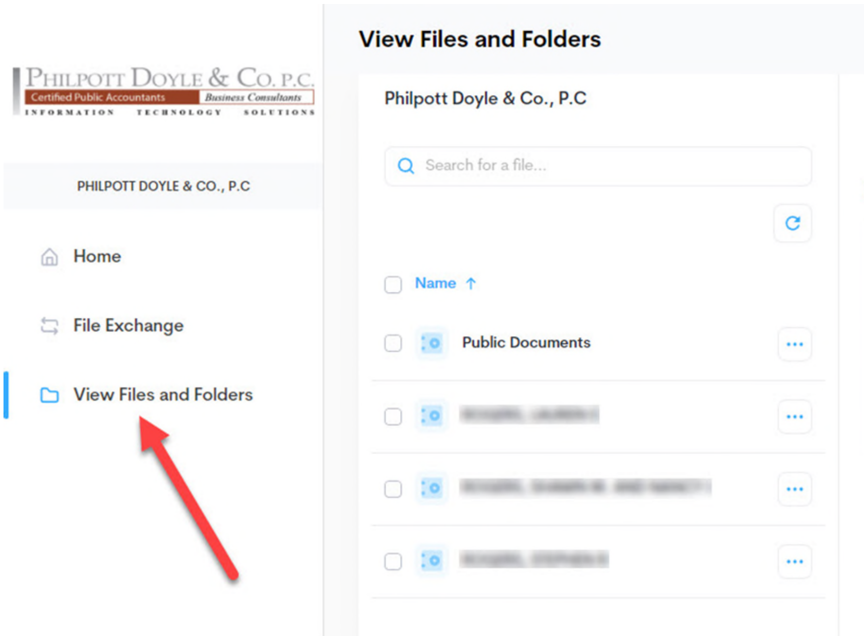


For the last step, drag the documents you want to upload to the blue box that will appear under the "View Files and Folders" screen.

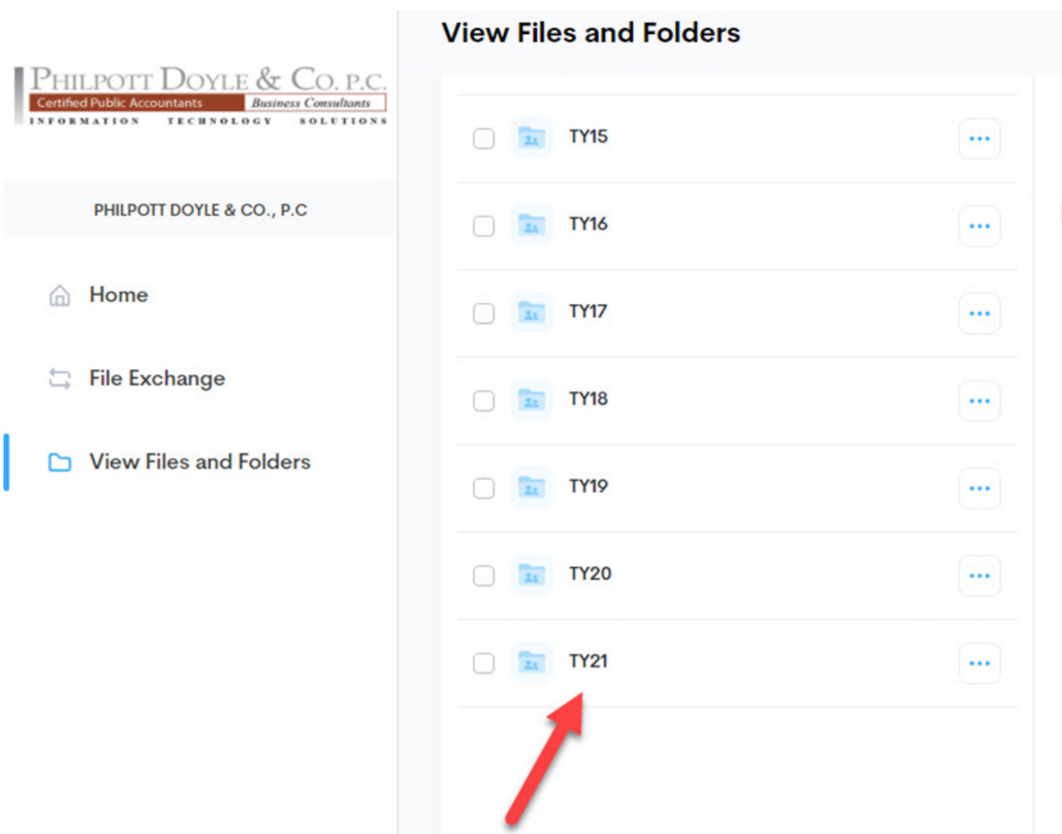


HOW TO DOWNLOAD FILES FROM YOUR SMARTVAULT

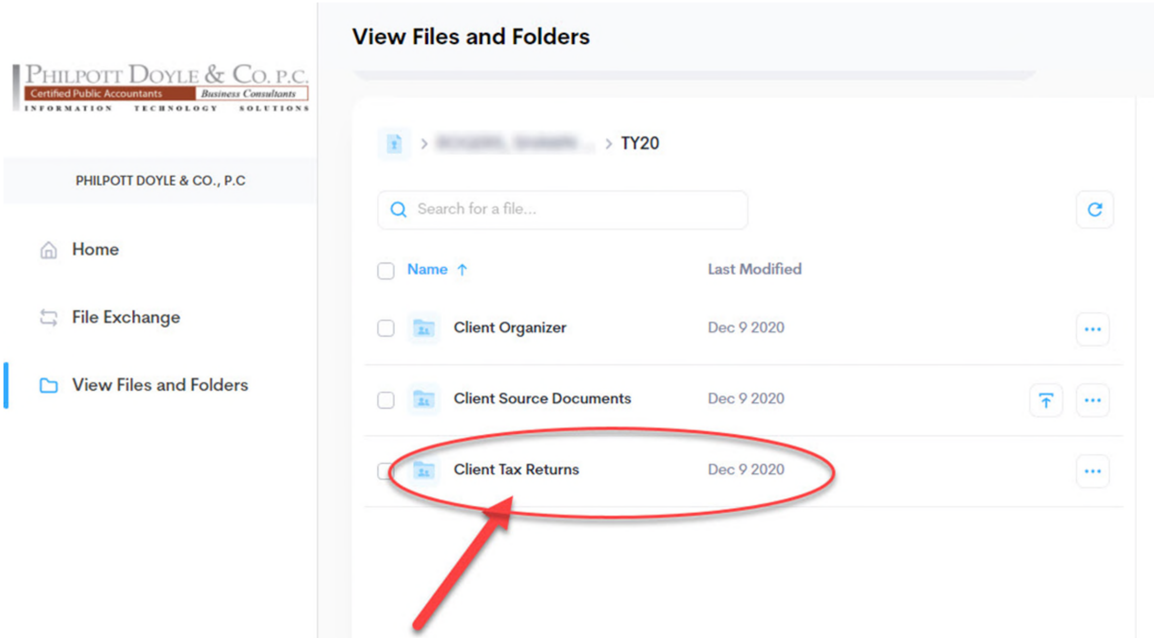
Login to your account. At your home page screen, select "View Files and Folders". If you are linked to more than one account, select the account you want to use on the right.



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 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.