

# SMARTVAULT

## *tips & tricks*

### **Getting Started With SmartVault**

To use SmartVault, you must receive an invitation via email from one of us at Tax Time Services. Once you receive this you can follow the link in the email to activate your account and use SmartVault.

### **Uploading Files**

As a Guest User on SmartVault, you can upload documents using the *Upload Documents* option from the left-hand navigation bar or the *Secure Document Upload* box on the main panel.

### **Downloading and Locating Files**

Once logged in, select the *View Files and Folders* on the left-hand navigation bar or click the *View Your Documents* button in the "All your documents, One Place" box.

Click the folder with your name or company name. Here is where the person who invited you to SV has shared files with you. Navigate to the specific folder with the files you want to download. Click the three dots (Action Button) to the right of the folder and select *Download*.

### **Responding to Document Requests**

When someone asks for documents using the SmartVault "Request Docs" feature, you'll get an email. This email contains a link to upload the requested documents. All you need to do is open that email and click the link!

### **SmartVault App for Mobile Devices**

#### **Downloading SmartVault on your Apple Device**

1. Open the App Store on your iPad or iPhone.
2. In the Search bar, enter SmartVault, and select SmartVault for iPhone and iPad in the search results list.
3. Install the app. You may need to enter your Apple ID and password.
4. Open the SmartVault app.
5. Tap Sign In to authorize the app to use your SmartVault account.
6. Enter your SmartVault user ID, email address, and password, and then tap Sign In.
7. You can now view your files and folders, share documents, and upload documents to SmartVault from files and apps on your iOS device, such as Dropbox or Google Drive.

Visit <https://help.smartvault.com/hc/en-us> for easy-to-follow instructional videos and all of the information you need for signing into and navigating your SmartVault account!

Let us know if you need help, that's what we are here for!