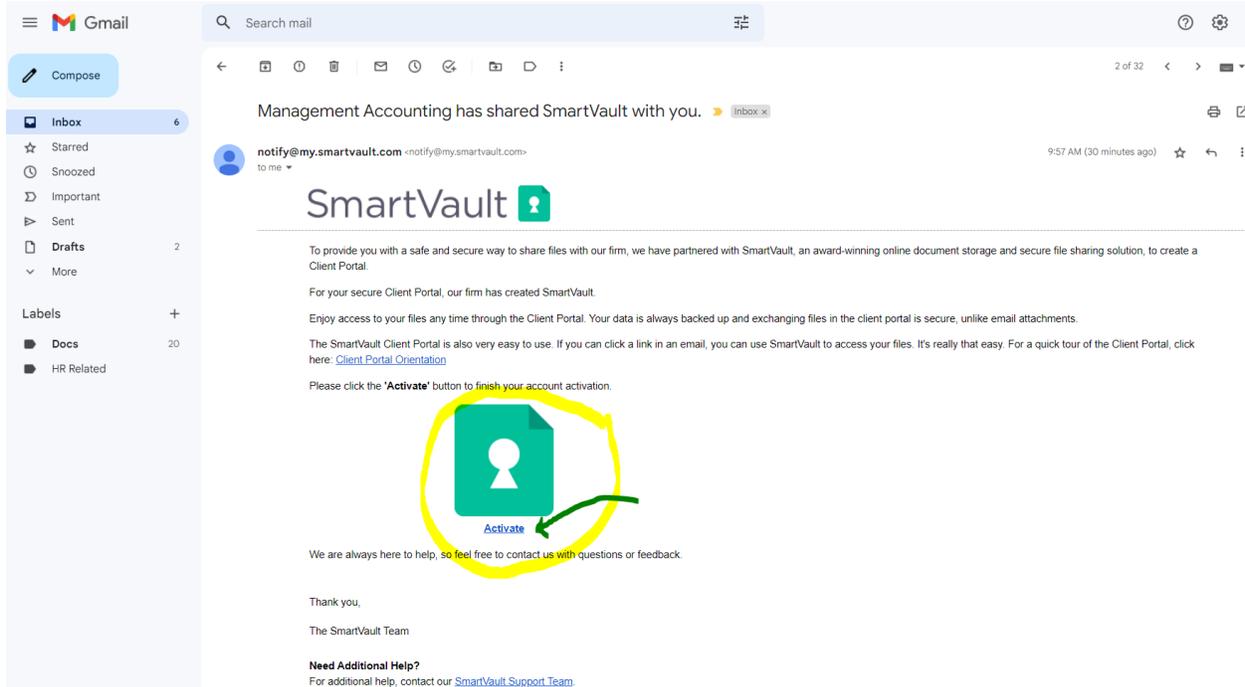


How to use SmartVault

Activating your SmartVault account

- 1) You will receive an email notification from notify@my.smartvault.com that Management Accounting has shared SmartVault with you.
**If you do not see this email and are expecting to be invited please check your SPAM/JUNK folder as they could be filtered there. Otherwise, please contact office@mainebcaccounters.com to request an invitation.*
- 2) Open the email and click on the blue **Activate** link in the email. This will walk through the steps to activate your secure SmartVault Account. Follow the prompts as directed to verify your email address.



- 3) Once your account is activated and you have verified your email address you will be able to log in to my.smartvault.com using the credentials you established during activation.
- 4) Management Accounting may send additional SmartVault folder invitations to your email address if you have business, a dependent, Trust or other entity that you will need to share documents for you. You will only need to activate the account one time but you will need to accept each invite we send in order to view and access those folders when you log in to SmartVault with your existing credentials.

Uploading to SmartVault

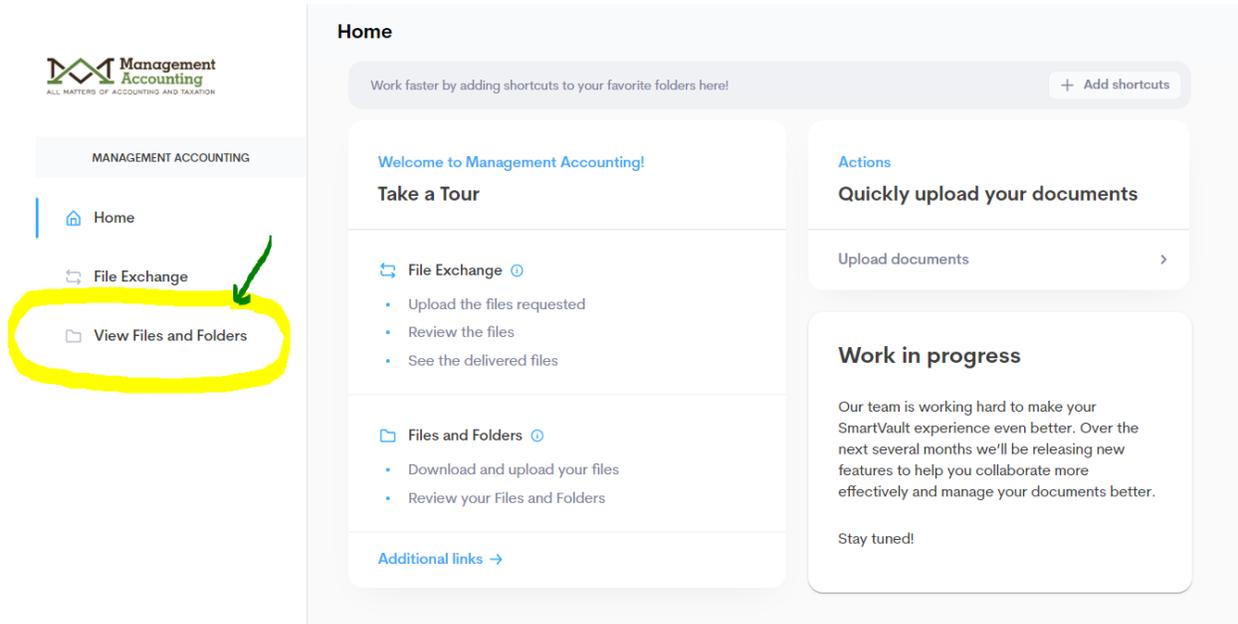
- 1) Go to my.smartvault.com this will bring you to the login page.

A screenshot of the SmartVault Sign In page. The page has a light blue background. At the top, it says 'Sign In' and 'Sign in to your SmartVault account below'. There are two input fields: 'Email Address' with the placeholder 'Example@gmail.com' and 'Password' with a 'SHOW' button. Below the password field is a checkbox for 'Remember email' and a 'Sign In' button with a lock icon. At the bottom, there is a link that says 'Can't sign in?'.

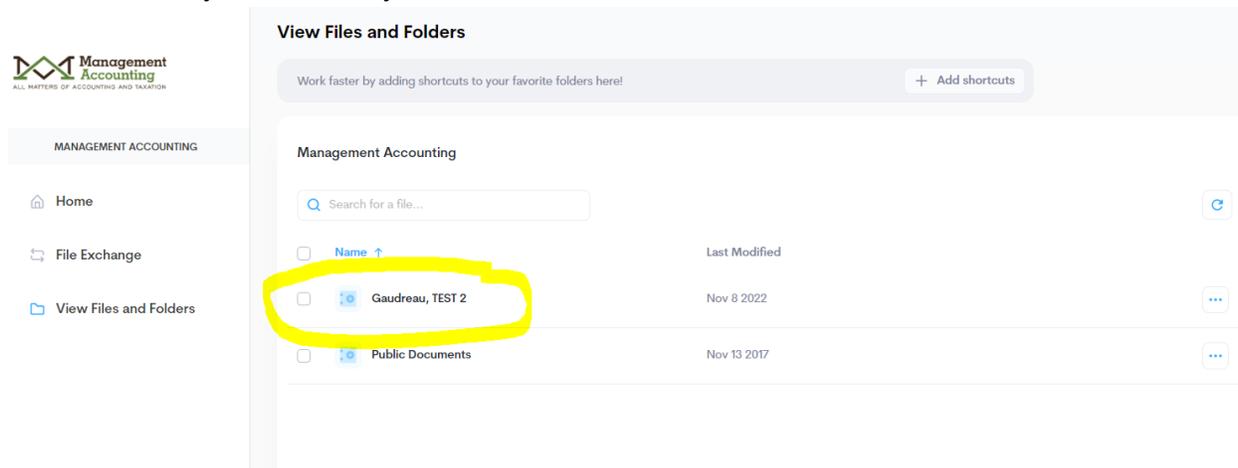
2) Enter your registered email address and Password and click the 'Sign in' button.

**If you can't remember your password, click on the blue 'Can't Sign in?' link just below the sign-in button. That will bring you to a screen that will guide you in resetting your password.*

3) On the home screen, navigate to the far left panel and click the 'View Files and Folders'



4) Once in 'Files and Folders' screen select the file where you would like to upload documents. This will be the file with your name or your business name.



**The 'Public Documents' is where you will go to find copies of helpful and requested forms from our office, such as Client Intake Forms, Engagement Forms, Schedule C and E Worksheets, and Tax Organizers.*

5) Once in your file, you will want to navigate the related Tax Year (TY) Folder for your documents. If you are new client uploading prior year returns you can upload those to the current TY Folder as it will likely be the only folder available.

View Files and Folders

Work faster by adding shortcuts to your favorite folders here!

+ Add shortcuts

> Gaudreau, TEST 2

Search for a file...

<input type="checkbox"/>	Name ↑	Last Modified
<input type="checkbox"/>	TY22	Nov 8 2022

6) Once in the correct 'TY' Folder you will select 'Client Source Documents'

View Files and Folders

Work faster by adding shortcuts to your favorite folders here!

+ Add shortcuts

> Gaudreau, TEST 2 > TY22

Search for a file...

<input type="checkbox"/>	Name ↑	Last Modified
<input type="checkbox"/>	Client Organizer	Nov 8 2022
<input type="checkbox"/>	Client Source Documents	Nov 8 2022
<input type="checkbox"/>	Client Tax Returns	Nov 8 2022

7) In 'Client Source Documents' you can simply drag and drop the files that you would like to upload or click on the blue 'Upload Files' button on the far right to browse your computer and choose the files you would like to upload. Repeat this process for all documents that you want to upload and share with us.

View Files and Folders

Work faster by adding shortcuts to your favorite folders here!

+ Add shortcuts

> Gaudreau, TEST 2 > TY22 > Client Source Doc...

Search for a file...

<input type="checkbox"/>	Name ↑	Last Modified
<input type="checkbox"/>	SmartVault Misc Notes.docx	Dec 8 2022

Upload file

Once you have uploaded your documents and they appear in the list they will immediately be available for Management Accounting to view.

NOTE: Clients are unable to delete files from the list. If you have uploaded files in error please contact our office and we can delete the appropriate files from the list.

1) Go to my.smartvault.com this will bring you to the login page.



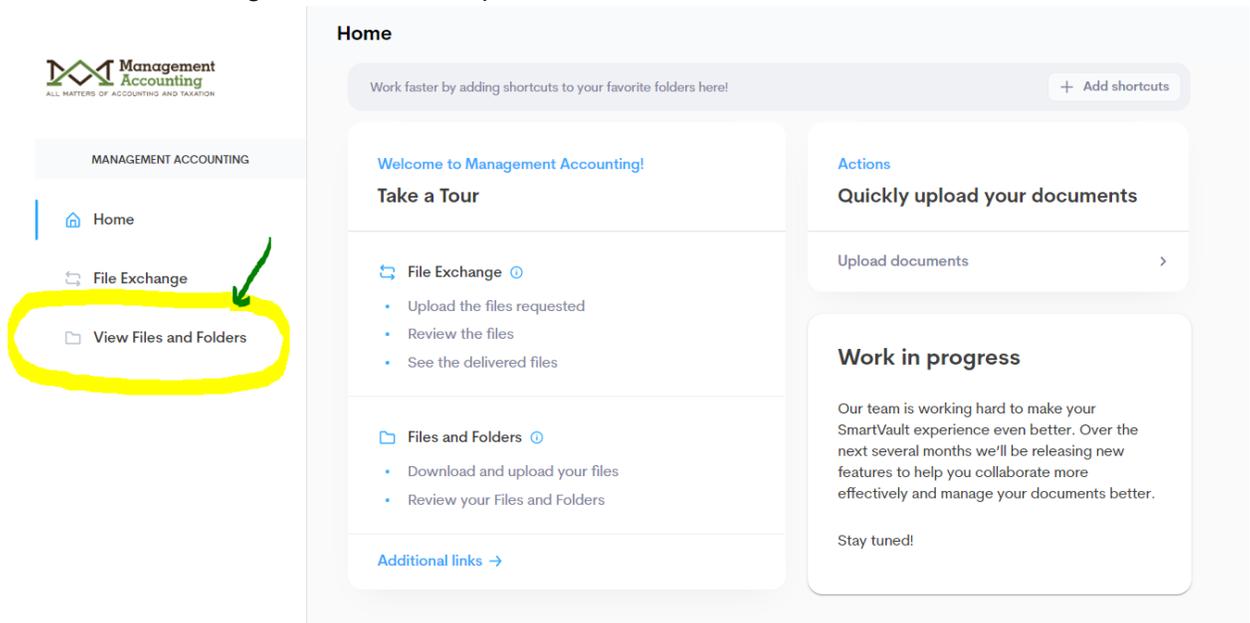
The image shows a 'Sign In' form for SmartVault. It has a title 'Sign In' and a subtitle 'Sign in to your SmartVault account below'. There are two input fields: 'Email Address' with the placeholder 'Example@gmail.com' and 'Password' with a 'SHOW' toggle. Below the fields is a checkbox for 'Remember email' and a 'Sign In' button. At the bottom, there is a link for 'Can't sign in?'.

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2) Enter your registered email address and Password and click the 'Sign in' button.

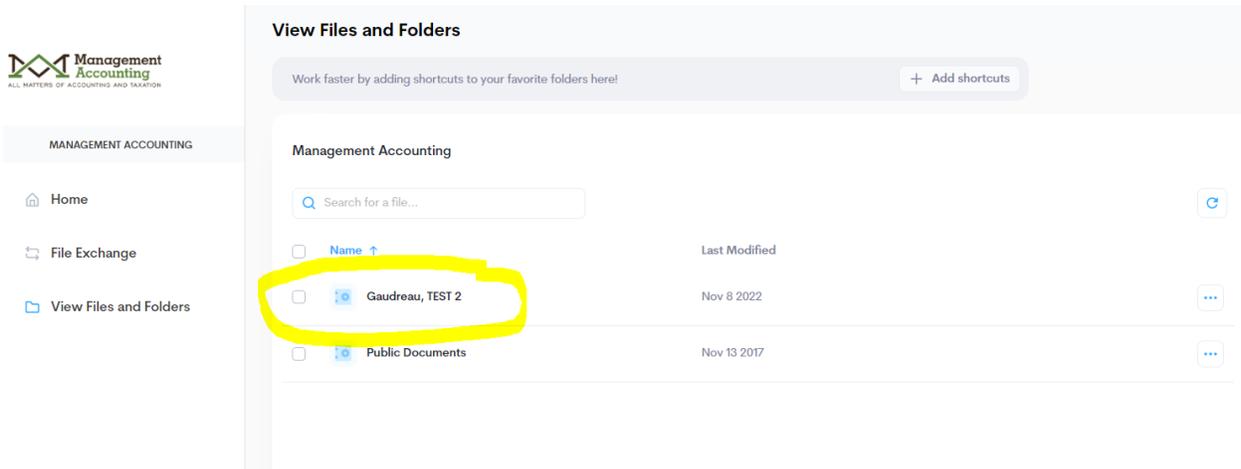
**If you can't remember your password, click on the blue 'Can't Sign in?' link just below the sign-in button. That will bring you to a screen that will guide you in resetting your password.*

3) On the home screen, navigate to the far left panel and click the 'Files and Folders'

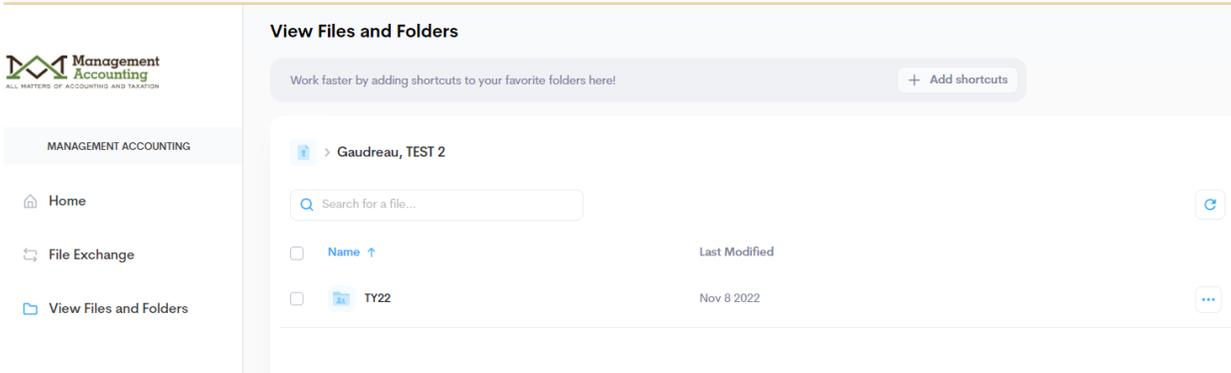


The image shows the SmartVault Home dashboard. On the left is a navigation sidebar for 'MANAGEMENT ACCOUNTING' with options: Home, File Exchange, and View Files and Folders. The 'View Files and Folders' option is highlighted with a yellow circle and a green arrow. The main content area is titled 'Home' and contains several cards: 'Welcome to Management Accounting! Take a Tour', 'File Exchange' (with sub-points: Upload the files requested, Review the files, See the delivered files), 'Files and Folders' (with sub-points: Download and upload your files, Review your Files and Folders), 'Actions' (with sub-point: Quickly upload your documents), and 'Work in progress' (with a message about new features and 'Stay tuned!').

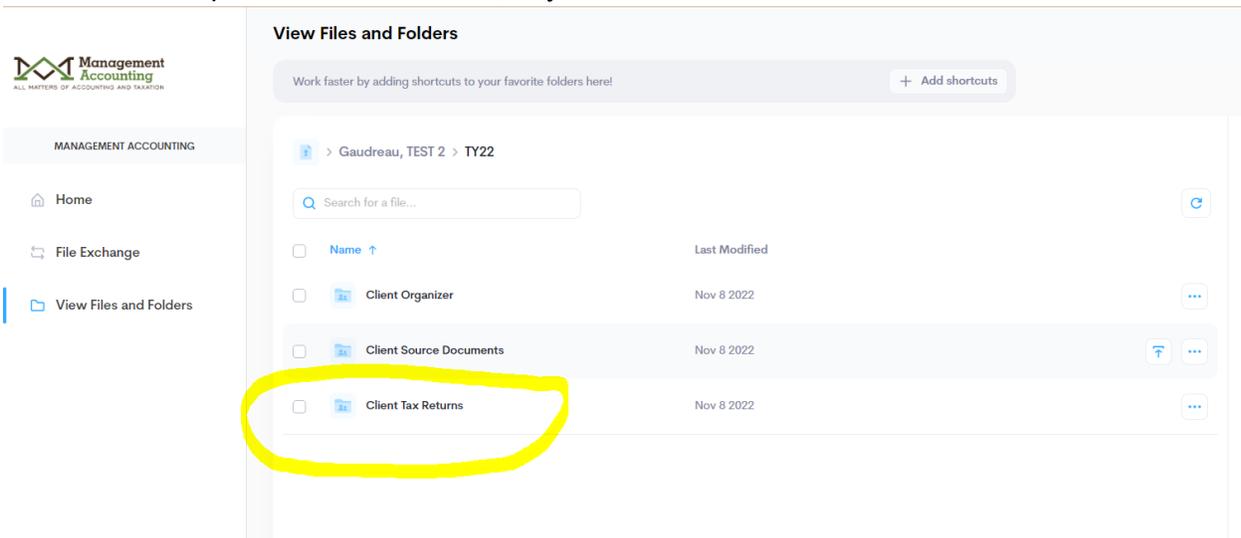
- 4) Once in 'Files and Folders' screen select the file where you would like to upload documents. This will be the file with your name or your business name.



- 5) Once in your file, you will want to navigate the related Tax Year (TY) Folder for your documents.



- 6) Once in the correct 'TY' Folder you will select 'Client Tax Returns'. Once you in Client Tax Returns you can find PDF copies of the Tax Return, Payment Vouchers and the Form 8879.



- 7) Click on the item or items you would like to view, download and/or print. If you wish to sign the Form 8879 from SmartVault you will need to print it, sign it and upload it back to SmartVault in the 'Client Source Documents' folder for the relevant tax year. OR download it to your computer, sign it electronically and upload the signed version to Smartvault in the 'Client Source Documents' folder for the relevant tax year.

MANAGEMENT ACCOUNTING

- Home
- File Exchange
- View Files and Folders

View Files and Folders

Work faster by adding shortcuts to your favorite folders here!

+ Add shortcuts

> Gaudreau, TEST 2 > TY22 > Client Tax Returns

Search for a file...

<input type="checkbox"/>	Name ↑	
<input type="checkbox"/>	 Gaudreau, Test 2022 1040 & 1040ME.pdf	Dec 8 2022
<input type="checkbox"/>	 Gaudreau, Test 2022 Federal Tax Payment Voucher.pdf	Dec 8 2022
<input type="checkbox"/>	 Gaudreau, Test 2022 Form 8879.pdf	Dec 8 2022
<input type="checkbox"/>	 Gaudreau, Test 2022 Maine Tax Payment Voucher.pdf	Dec 8 2022

- Download
- Copy
- Properties

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