

# Activating your Guest Account

## Note

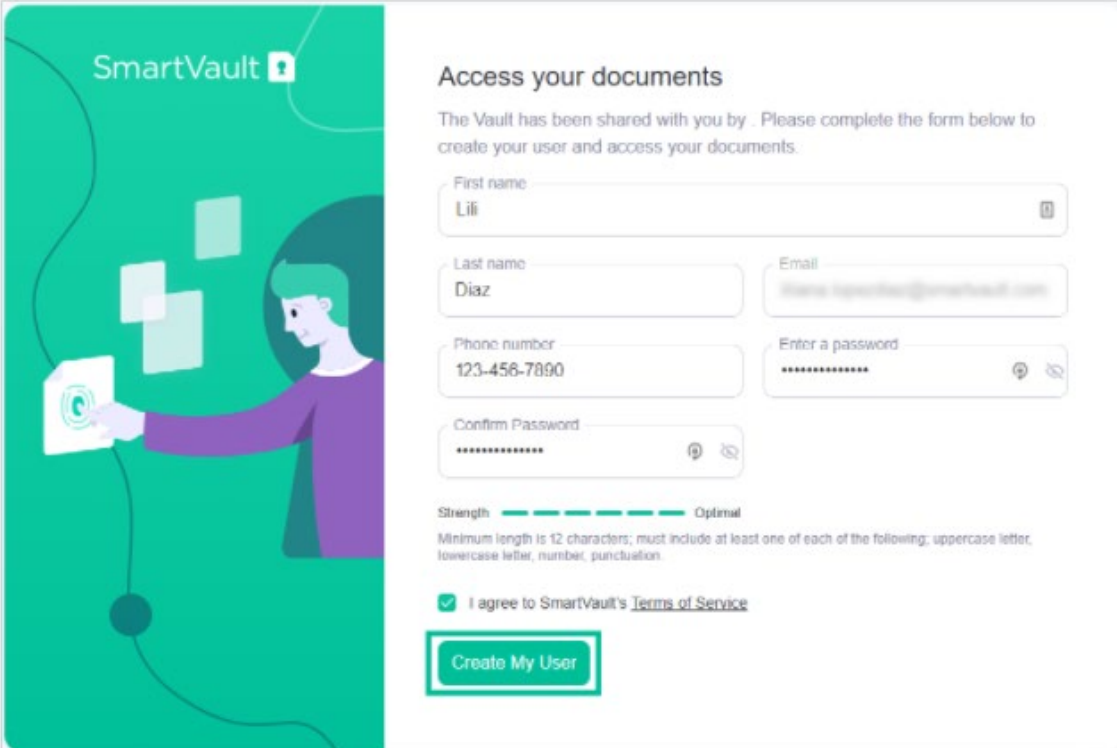
To activate your guest account and access SmartVault, you must have your account administrator invite you. If you have not received an invitation email, reach out to your account administrator and ask them to invite you.

- 1 Open your activation email from SmartVault.
- 2 Click **SmartVault Activation Link**.
- 3 Enter your phone number and password.

## Note

The rest of your information is already entered by default.

- 4 Click **Create My User**.

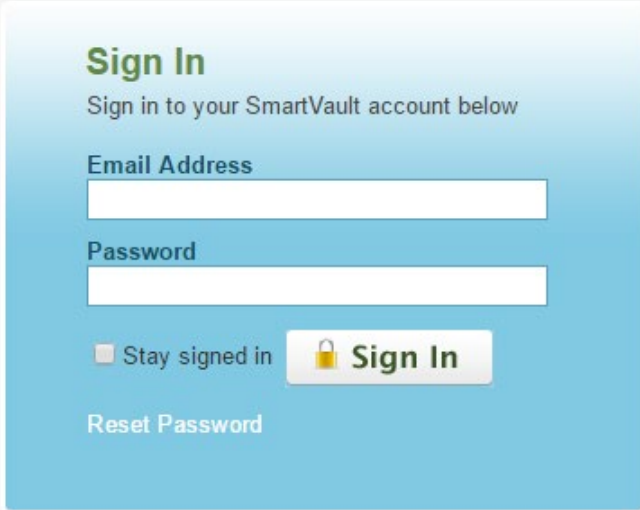


The image shows a screenshot of the SmartVault user creation interface. On the left is a green illustration of a person holding a document. The main form area is titled "Access your documents" and contains the following fields and elements:

- First name:** Lili
- Last name:** Diaz
- Phone number:** 123-456-7890
- Email:** lili.diaz@smartvault.com
- Enter a password:** [masked]
- Confirm Password:** [masked]
- Strength indicator:** A progress bar showing the password strength, with the label "Optimal" at the end.
- Terms of Service:** A checked checkbox next to the text "I agree to SmartVault's [Terms of Service](#)".
- Create My User:** A prominent button at the bottom.

# Signing in to the Portal

- 1 Go to <https://my.smartvault.com>.



The image shows a 'Sign In' form for SmartVault. The form has a blue gradient background. At the top, it says 'Sign In' in bold green text, followed by 'Sign in to your SmartVault account below'. There are two input fields: 'Email Address' and 'Password'. Below the 'Password' field is a checkbox labeled 'Stay signed in' and a 'Sign In' button with a lock icon. At the bottom, there is a link for 'Reset Password'.

- 2 Enter your **Email Address** and **Password**.



## Note

If you want SmartVault to remember your user name and password, enable the **Stay signed in** checkbox.

- 3 Click **Sign In**.

# Uploading Files as a Guest User

## Overview

As a Guest User, you can upload files to the SmartVault folder(s) to which you have access.



### Note

In the example below, we are uploading a [2020 W-2 form] requested by your accountant into the Client Source Documents folder.

## Upload Files

Please note that we will only accept the following type of attachments, PDF, .DOC or .XLS. If there are more than 5 attachments you may incur a \$25 administrative/processing fee. WE WILL NOT accept any pictures (JPEG, GIF, PNG, TIFF, RAW or PSD).

1

Sign in to the [SmartVault Portal](#).

2

Enter your email address and password you used to activate your guest account.

3

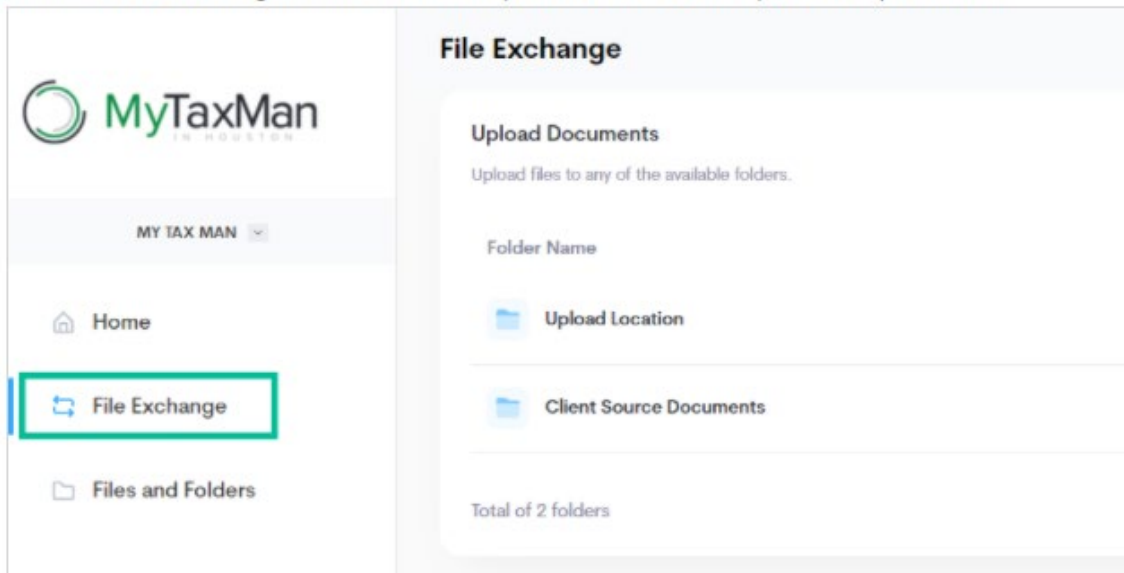
Click **Sign In**.



### Note

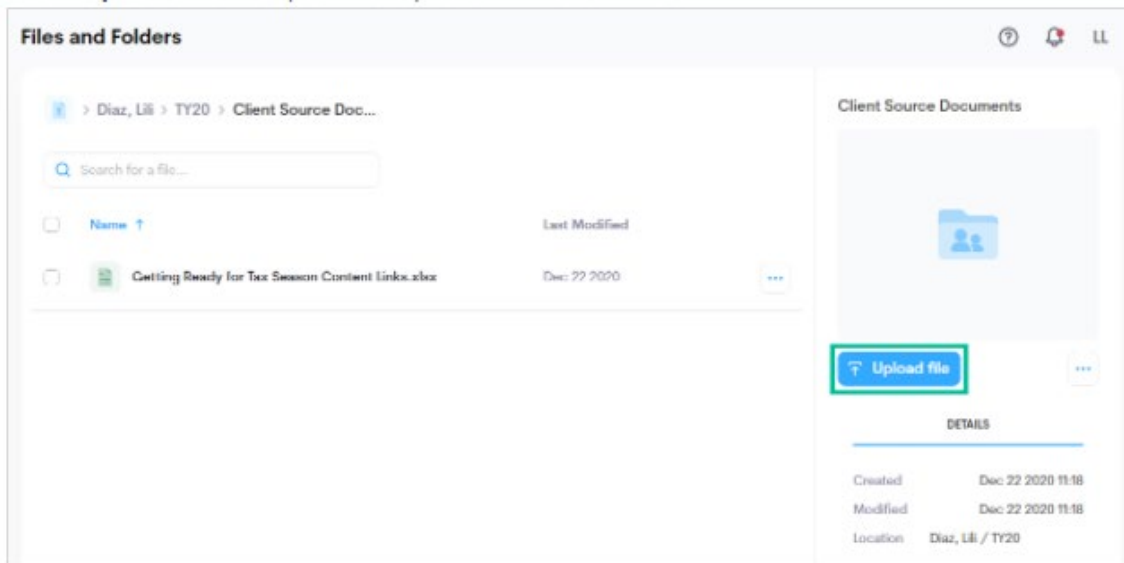
If you have forgotten your password, click **Can't sign in?**

- 4 Select **File Exchange**. You will see only the folders where you can upload files.

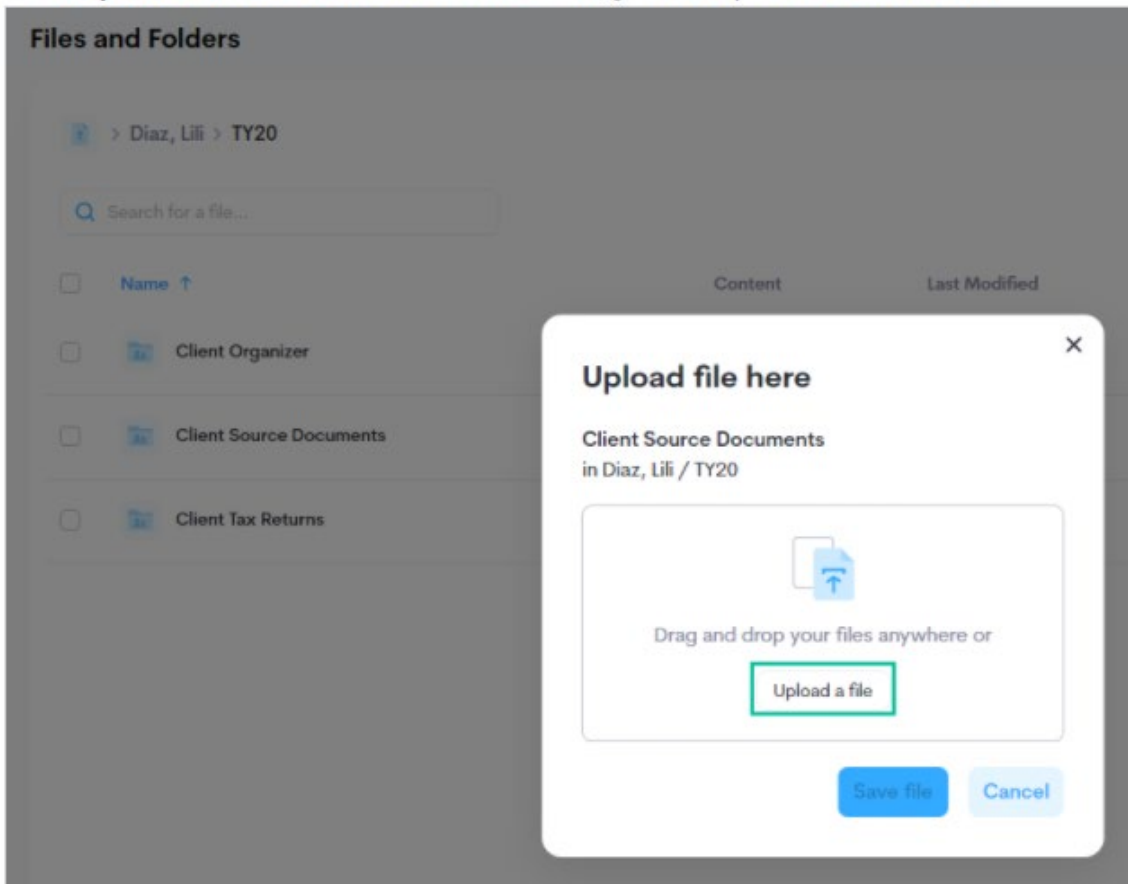


- 5 Click the folder where you would like to upload your files.

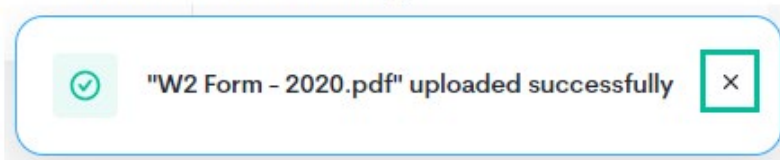
- 6 Click **Upload file** to open the Upload file here window.



- 7 Click **Upload a file** to browse for the file or drag and drop it into the window.



- 8 Click **Upload file**.
- 9 Once all files have been uploaded, click **Save file**. A confirmation message appears.
- 10 Click the **x** to close the message.



Your accountant will automatically receive a notification whenever you upload files to your folder, so you don't have to let them know.

Click here to watch a video [Using SmartVault](#)

Access to SmartVault Client Portal [SmartVault Client Portal](#)