

Activating Your SmartVault Portal

1. You will receive an invitation to join our portal to your preferred email address. Please make sure the email you provided in your organizer is the correct email address.
2. The email will be from Notify@My.SmartVault.com. Please check your spam folder if you do not see it. In the email, you will see a button that says “Activate”. Click this button and it will take you to our portal to set up your login information.



To provide you with a safe and secure way to share files with our firm, we have partnered with SmartVault, an award-winning online document storage and secure file sharing solution, to create a Client Portal.

For your secure Client Portal, our firm has created the vault "Test, Laurie".

Enjoy access to your files any time through the Client Portal. Your data is always backed up and exchanging files in the client portal is secure, unlike email attachments.

The SmartVault Client Portal is also very easy to use. If you can click a link in an email, you can use SmartVault to access your files. It's really that easy. For a quick tour of the Client Portal, click here: [Client Portal Orientation](#)

Please click the 'Activate' button to finish your account activation.



3. Complete the “Access your Documents” form. Please make sure the information you submit is accurate. Choose and confirm a password. Read and accept the terms of service and click on “Create My User”.
4. After you “Create My User” you will be prompted to the “Sign In” screen. If your password does not automatically populate, please enter your chosen password.

A screenshot of the SmartVault Sign In screen. The background is a light blue gradient. At the top, it says "Sign In" in green, followed by "Sign in to your SmartVault account below" in grey. There are two input fields: "Email Address" with "client@gmail.com" entered, and "Password" with "....." entered. To the right of the password field is a "SHOW" button. Below the fields is a checkbox labeled "Remember email" which is unchecked. To the right of the checkbox is a "Sign In" button with a yellow padlock icon. At the bottom right, there is a link that says "Can't sign in?" in blue.

To upload your documents

- A. Select *Upload documents* from the panel on the left of the page or use the *Secure Document Upload* box in the center of the screen.

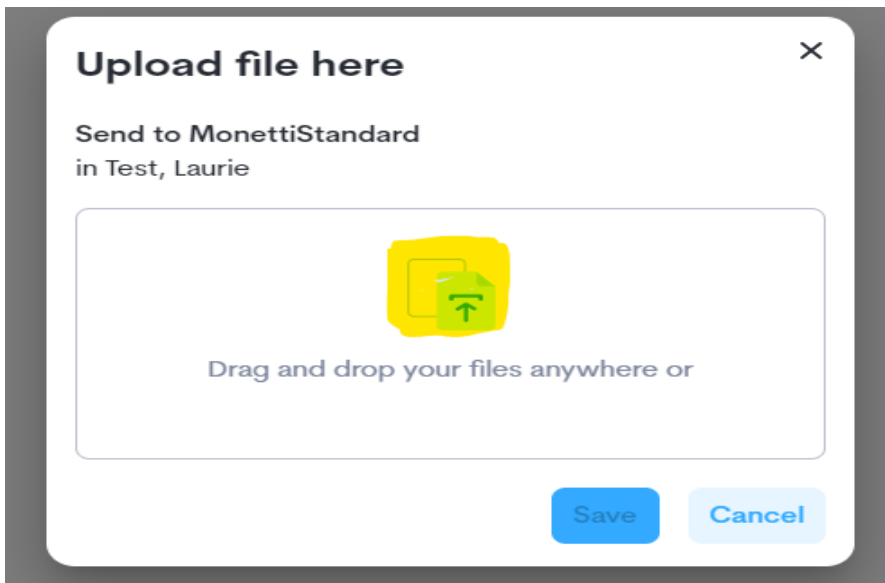
The screenshot shows the MonettiStandard Home dashboard. On the left is a navigation sidebar with the MonettiStandard logo and menu items: Home, Upload Documents, View Files and Folders, and Requested Docs. The main content area is titled "Home" and includes a header with the text "Work faster by adding shortcuts to your favorite folders here!" and a "+ Add shortcuts" button. Below the header are four main cards: 1. "Secure Document Upload" with a document icon and an "Upload a Document" button. 2. "All Your Documents, One Place" with a folder icon and a "View Your Documents" button. 3. "Need Help Navigating?" featuring a "SmartVault CLIENT PORTAL" video player. 4. "Document Requests Pending!" with a document icon and a "View & Respond to Requests" button.

- B. Select “Send to MonettiStandard”.

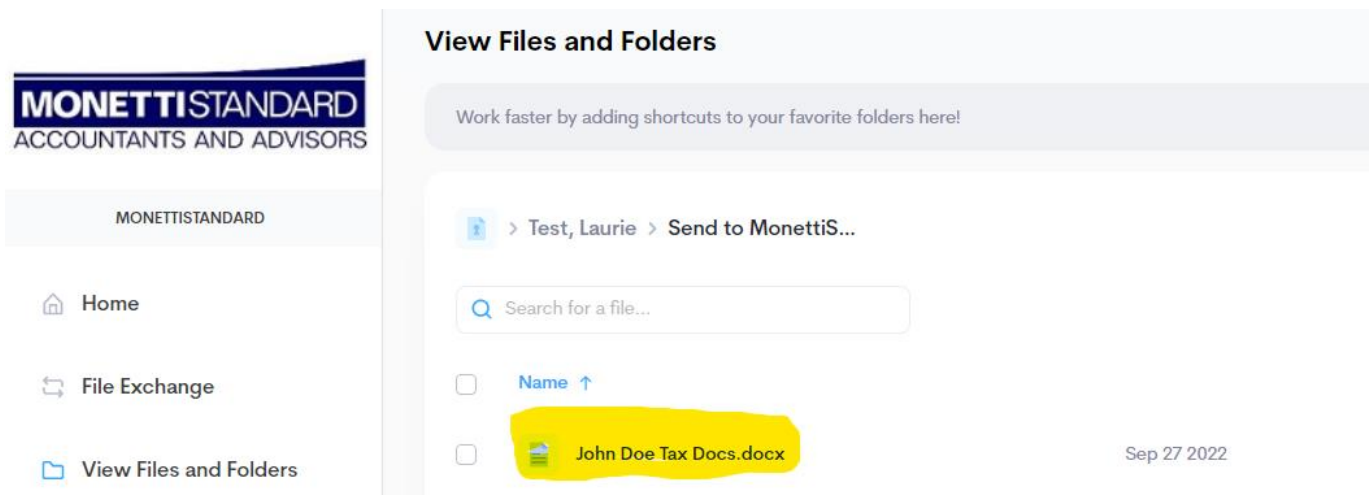
- C. Select “Upload file”.

The screenshot shows the "View Files and Folders" interface. The left sidebar is the same as in the previous image, but the "View Files and Folders" option is selected. The main content area is titled "View Files and Folders" and includes the same header with "Work faster by adding shortcuts to your favorite folders here!" and "+ Add shortcuts" button. Below the header, the breadcrumb path is "> Test, Laurie > Send to MonettiS...". There is a search bar with the placeholder text "Search for a file...". Below the search bar is a table header with a checkbox and the text "Name ↑". The main area is empty, showing a folder icon and the text "This folder is empty. Be the first to add a file!". A yellow highlight is placed over the "Upload file" button in the top right corner of the main content area.

- D. You may either drag and drop your files into the highlighted area OR browse and select files and upload. After you upload your file, click Save.



- E. Your document will then show up in the Send to MonettiStandard folder (see below). Once you see that your documents have been successfully uploaded, you can exit SmartVault.



- **Please make every effort to combine your documents and save as one PDF file rather than uploading single documents. This will help ensure that your return is processed in a timely manner.**
- **Lastly, we will receive a notification that you have uploaded your files. We check for notifications daily so there is no need to call the office and verify. If you see the files in your folder, we received them!**