



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

- 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**.

Sign In
Sign in to your SmartVault account below

Email Address
ldiaz@smart.com

Password
.....

Remember email

Sign In

[Can't sign in?](#)



Note

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



After logging in:

On the left click **View Files & Folders**

Click on your name

Scroll to the bottom of the list

Select appropriate tax year: TY21

Select the appropriate folder depending on your need:

Client Organizer (Download your Organizer)

Client Source Documents (Send documents to us)

Client Tax Returns (Your income tax return)

Print All Forms (Our invoice, tax pmt coupons etc)

Note: You can upload or download depending on the folder you choose. Upload/download options are allowed in these folders:

Client Source Documents

Client Tax Returns

Print All Forms



INGALLS, INGALLS & CO

- Home
- File Exchange
- View Files and Folders



Home

Work faster by adding shortcuts to your favorite folders here! [+ Add shortcuts](#)

Welcome to Ingalls, Ingalls & Co!
Take a Tour

- File Exchange**
- Upload the files requested
 - Review the files
 - See the delivered files

- Files and Folders**
- Download and upload your files
 - Review your Files and Folders

[Additional links](#) →

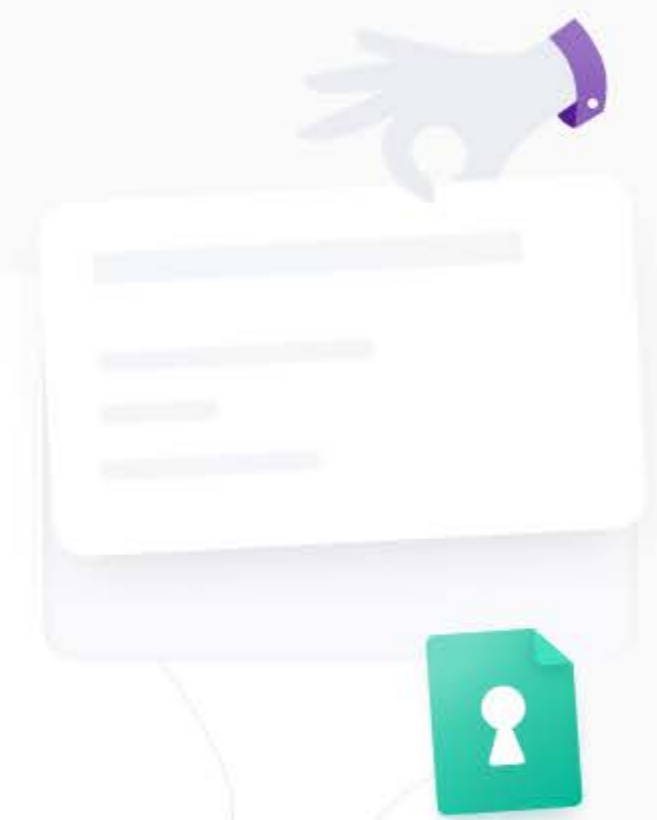
Actions
Quickly upload your documents

[Upload documents](#) >

Work in progress

Our team is working hard to make your SmartVault experience even better. Over the next several months we'll be releasing new features to help you collaborate more effectively and manage your documents better.

Stay tuned!



Sign-in form with fields for Email (admin@ingalls-c...), Password, Remember me (checked), and buttons for Sign In and For...



View Files and Folders

Work faster by adding shortcuts to your favorite folders here! [+ Add shortcuts](#)

- INGALLS, INGALLS & CO
- Home
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Ingalls, Ingalls & Co

Search for a file...

<input type="checkbox"/>	Name ↑	Last Modified	
<input type="checkbox"/>	YOUR NAME	Aug 10 2017	
<input type="checkbox"/>	Public Documents	Aug 4 2017	

Ingalls, Ingalls & Co



DETAILS

Created	Aug 4 2017 11:09
Modified	Aug 4 2017 11:09
Location	Ingalls, Ingalls & Co

Rows per page: 50



Admin panel with fields for Email (admin@ingalls-c...), Password, Remember me (checked), Sign In, and For...



INGALLS, INGALLS & CO

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View Files and Folders

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+ Add shortcuts

YOUR NAME

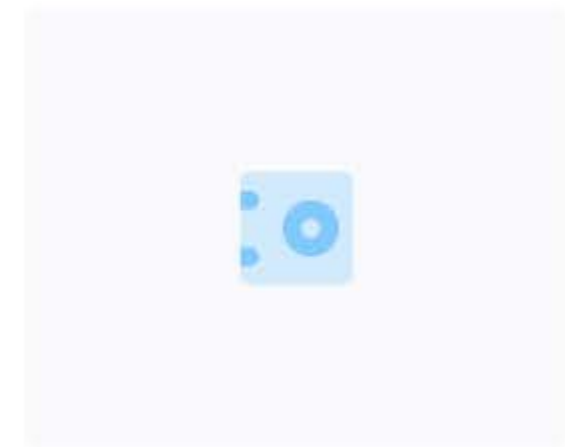
Search for a file...

<input type="checkbox"/>	Name ↑	Last Modified	
<input type="checkbox"/>	TY14	Dec 5 2019	...
<input type="checkbox"/>	TY15	Jan 30 2018	...
<input type="checkbox"/>	TY16	Jan 30 2018	...
<input type="checkbox"/>	TY17	Jan 30 2018	...
<input type="checkbox"/>	TY18	Dec 19 2018	...
<input type="checkbox"/>	TY19	Nov 19 2019	...
<input type="checkbox"/>	TY20	Dec 8 2020	...
<input type="checkbox"/>	TY21	Nov 30 2021	...

Note the different tax years and the default sort is oldest first.



YOUR NAME



DETAILS

Created Aug 10 2017 12:01
Modified Aug 10 2017 12:01
Location YOUR NAME

SmartVault

Sign In Form

Email: admin@ingalls-cpa.com

Password: [input]

Remember me

Sign In For...

View Files and Folders

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+ Add shortcuts

YOUR NAME > TY21

Search for a file...

<input type="checkbox"/>	Name ↑	Last Modified
<input type="checkbox"/>	Client Organizer	Nov 30 2021
<input type="checkbox"/>	Client Source Documents	Nov 30 2021
<input type="checkbox"/>	Client Tax Returns	Nov 30 2021
<input type="checkbox"/>	PRINT ALL FORMS	Nov 30 2021

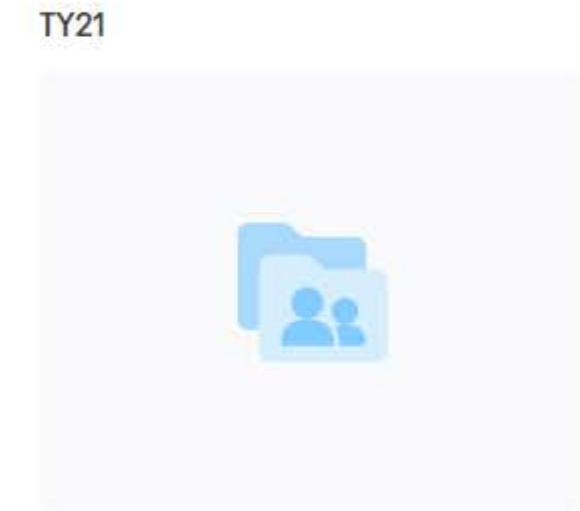
Click this icon to UPLOAD documents

click this icon to download documents

Select the appropriate folder depending on your need:
Client Organizer (Download your Organizer)
Client Source Documents (Send documents to us)
Client Tax Returns (Your income tax return)
Print All Forms (Our invoice, tax pmt coupons etc)

Note: You can upload or download depending on the folder you choose. Upload/download options are allowed in these folders:
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Client Tax Returns
Print All Forms

Rows per page: 50



DETAILS

Created Nov 30 2021 12:31
Modified Nov 30 2021 12:31
Location YOUR NAME



INGALLS, INGALLS & CO

Home

File Exchange

View Files and Folders

View Files and Folders

Work faster by adding shortcuts to your favorite folders here!

+ Add shortcuts

YOUR NAME > TY21 > Client Source Doc...

Search for a file...

Upload file

Name ↑

document 1 Feb 17 2022

document 2 Feb 17 2022

Client Source Documents



DETAILS



This is an alternate navigation method using file exchange.

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

MyTaxMan
IN HOUSTON

MY TAX MAN ▾

Home

File Exchange

Files and Folders

File Exchange

Upload Documents
Upload files to any of the available folders.

Folder Name

Upload Location

Client Source Documents

Total of 2 folders

- 5 Click the folder where you would like to upload your files.
- 6 Click **Upload file** to open the Upload file here window.

Files and Folders

> Diaz, Lili > TY20 > Client Source Doc...

Search for a file...

<input type="checkbox"/>	Name ↑	Last Modified	
<input type="checkbox"/>	Getting Ready for Tax Season Content Links.xlsx	Dec 22 2020	⋮

Client Source Documents

Upload file

DETAILS

Created	Dec 22 2020 11:18
Modified	Dec 22 2020 11:18
Location	Diaz, Lili / TY20





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File Exchange

UPLOAD DOCUMENTS

Upload files to any of the available folders.

Folder Name	Date Modified	Location
Client Source Documents	01/30/2018	[Redacted] / TY15
Client Tax Returns	01/30/2018	[Redacted] / TY15
PRINT ALL FORMS	01/30/2018	[Redacted] / TY15
Client Source Documents	01/30/2018	[Redacted] / TY16
Client Tax Returns	01/30/2018	[Redacted] / TY16
PRINT ALL FORMS	01/30/2018	[Redacted] / TY16
Client Source Documents	01/30/2018	[Redacted] / TY17
Client Tax Returns	01/30/2018	[Redacted] / TY17
PRINT ALL FORMS	01/30/2018	[Redacted] / TY17
Client Source Documents	12/19/2018	[Redacted] / TY18

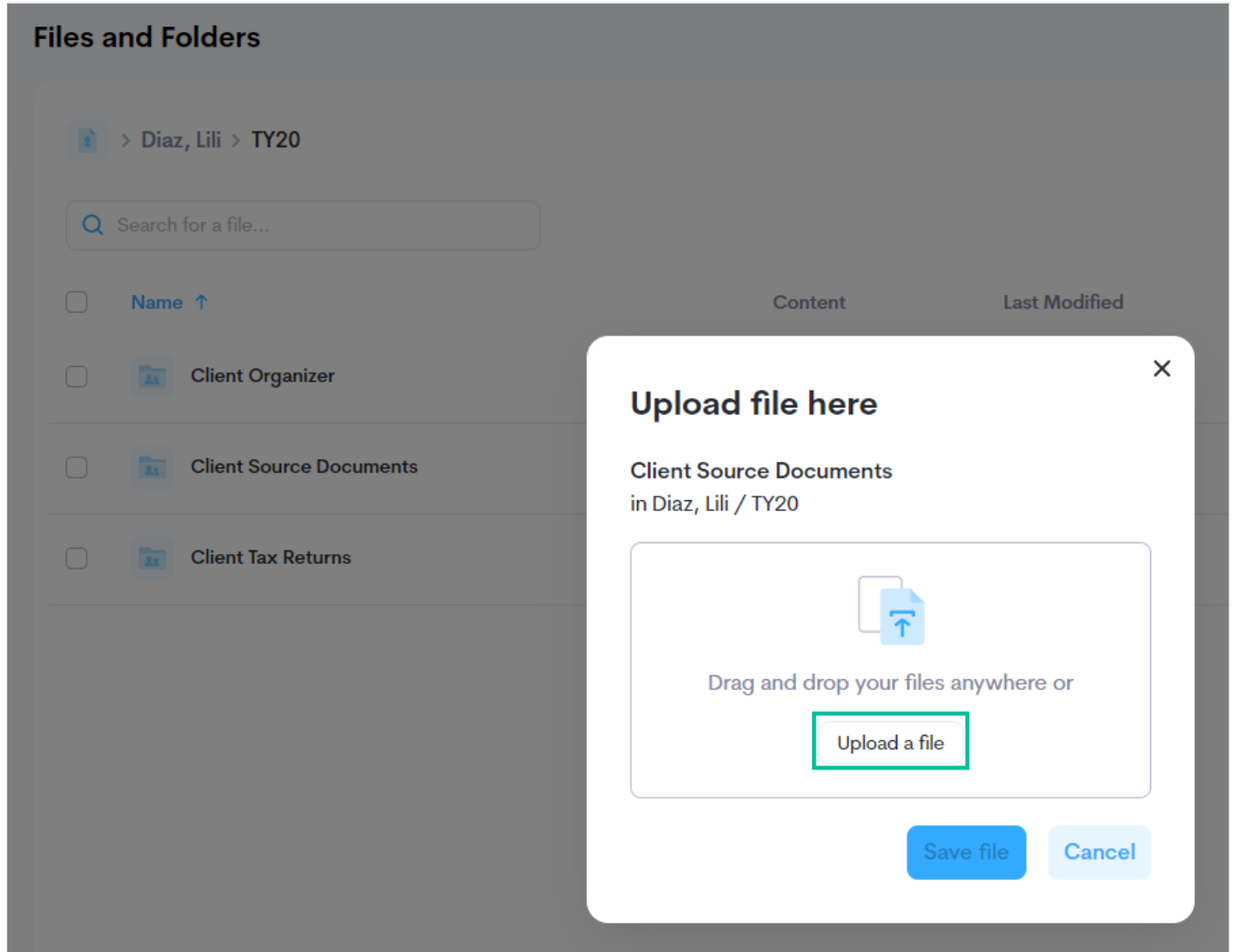
Note the different tax years and the default sort is oldest first.



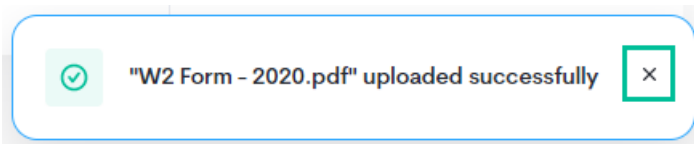
Email: admin@ingalls-c
Password: [Redacted]
 Remember e
Sign In Forq



- 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.

[< PREV](#)

[Reviewing Files Received as a Guest User](#)

