

SmartVault

Get The Most Out of Your SmartVault Trial

Trial Companion Guide

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This Trial Companion Guide will help you explore SmartVault on your own. It'll walk you through important tasks, like adding clients, requesting documents, branding your client portal, and more.

Looking for a guided experience? Schedule a 15-minute call with us. Our team can answer your questions, walk you through account configuration, as well as share best practices and how businesses like yours use SmartVault today.

Keep track of your progress by checking off completed steps.

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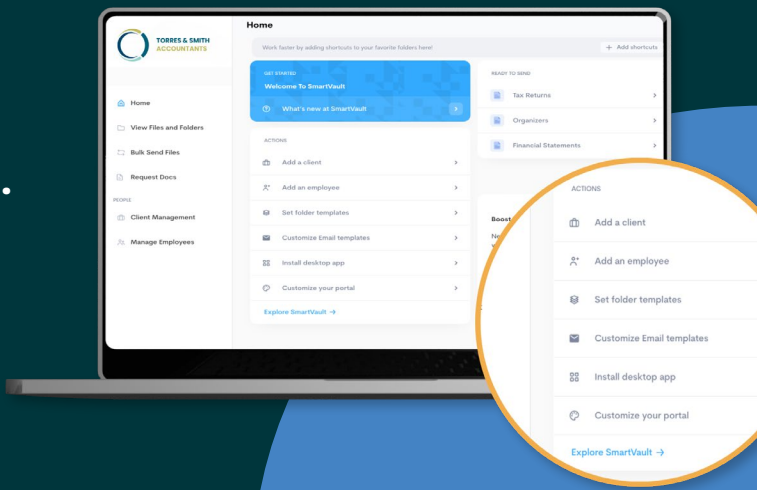
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Let Us Walk You Through Everything Here + More 17

Learn best practices and how 3 million people use SmartVault to gather, store, share, and eSign documents in the cloud.

Schedule a Call With Us

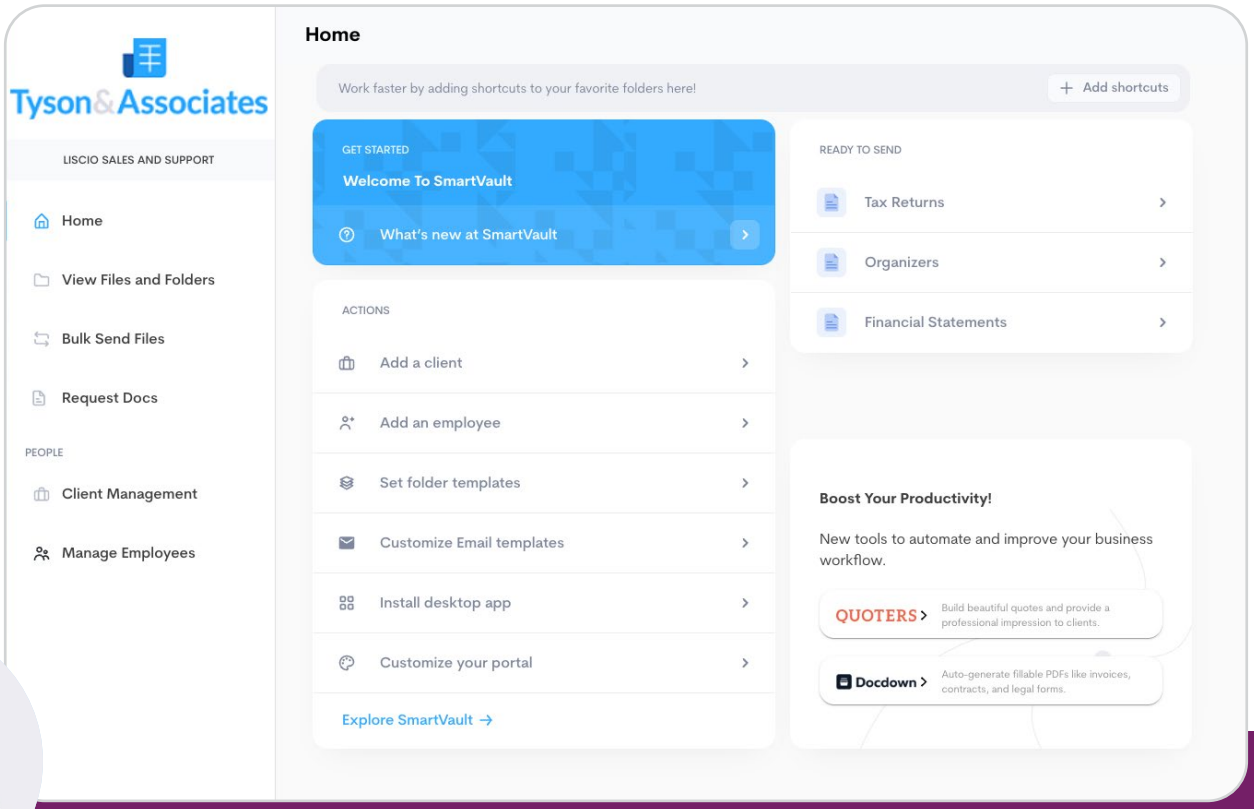


Getting to Know Your Trial Account

Before you start, let's review what's included in your trial account: the SmartVault client portal and the SmartVault desktop app.

I. Client Portal

The client portal is what you see when you log into your trial account online. It's completely browser-based, which means you—and users you approve—can access it 24/7 from any device (with Internet connection) from anywhere. This makes it easy to work and collaborate with others on the go. This portal is where you'll manage your client, employee, and firm documents as well as securely share files with clients or third parties.





Give clients an easy and professional way to view, upload, digitally sign, and download documents from a portal that's accessible anytime, from anywhere, and on any browser.

Learn More

II. Desktop Apps

SmartVault offers several desktop apps and features that help you work effectively on local devices like a laptop or PC. You can locate all the shortcuts to SmartVault's desktop functionalities from the *SmartVault Launchpad* on your desktop.

SmartVault Portal
Use the SmartVault Portal to store, view, and share documents online. SmartVault Administrators use the portal to configure security and manage the account.

SmartVault Inbox
Use the SmartVault Inbox to scan, upload, or download document from a any SmartVault folder.

SmartVault Drive
Map a drive on your local computer directly to SmartVault, then browse, search and manage SmartVault documents with Windows Explorer.

Scanner Integration
Learn more about scanners supported by SmartVault, or choose the options below to configure a scanner now

Back Up QuickBooks Data
Save a snapshot of your QuickBooks company files to a backup file in SmartVault.

SmartVault Connected Desktop
Use the new SmartVault Connected Desktop to view your Firm's Tax Clients and Vaults.

Import data
Import data from other products, accounting packages and supported formats.

SmartVault Support
View the SmartVault online help, search the SmartVault Knowledge Base, or open a support ticket.

SmartVault User Settings
Manage user settings and preferences for the SmartVault Desktop software.

Get Outlook Plug-in
Send, receive and manage SmartVault documents securely inside of Outlook.

> **"There were three main items that sold me on SmartVault: it offers portals and a logical file structure, it's cloud-based, and it [offers] extended convenience to my clients."**

Casey Lynch, CPA
Durango CPAs

Read Casey's success story.



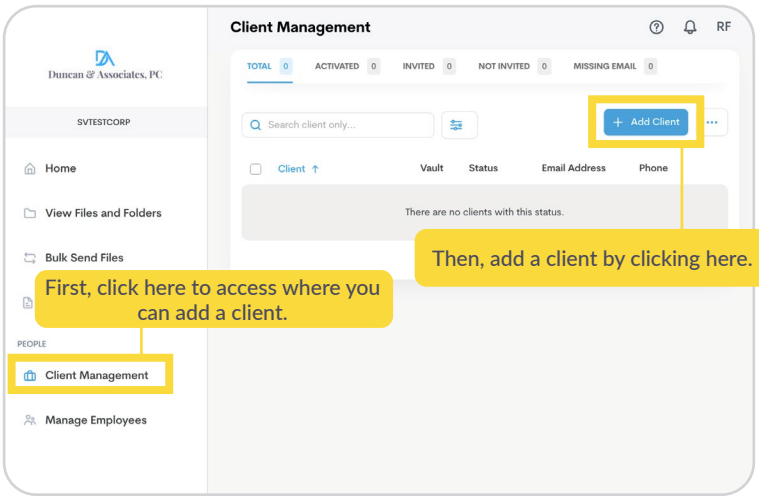
Exploring Your Free Trial

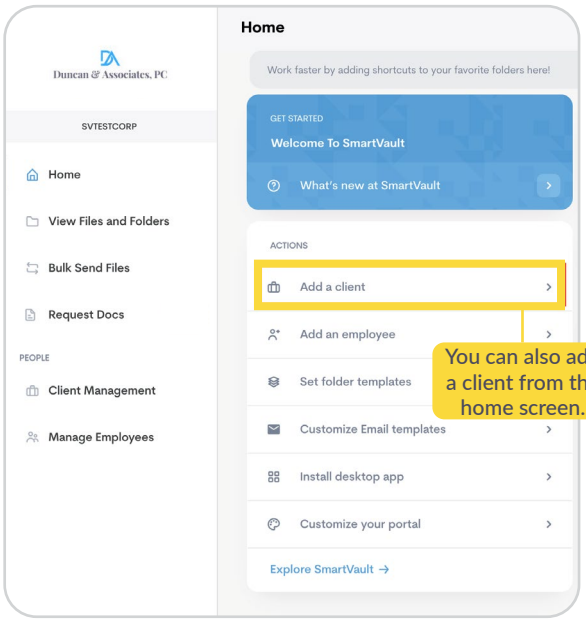
SmartVault is built to help you work productively and securely in the cloud. We're first going to learn how to collaborate with clients. You'll add clients, create folders, invite a client, and learn how to upload, download, and request documents. We'll also show you how to customize your SmartVault portal to your brand. Then, we'll teach you how to collaborate with your team in SmartVault. You'll add employees to your portal, manage employess, and assign employees to clients. Let's get started!

I. Collaborating with Clients

1-Add Client

First, you must set up the clients' account with our ***Add Client*** feature. You can access it from the ***Client Management*** area on the left-hand navigation panel, or the ***Add a Client*** shortcut from the ***Actions*** area on the portal homepage.



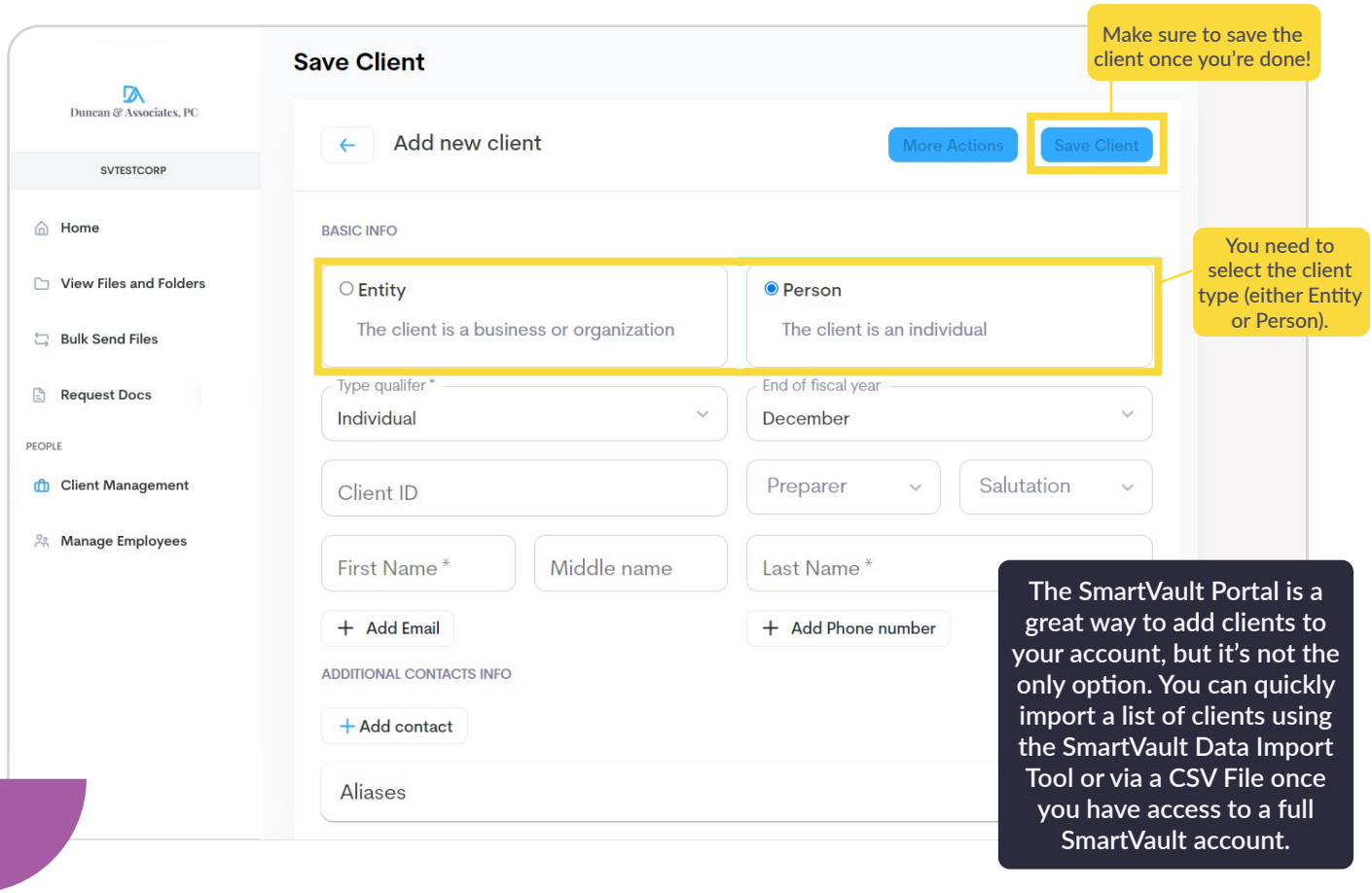


> **"SmartVault has allowed us to keep adding tax clients without having negative impacts on our ability to serve them efficiently."**

John Coleman, CPA
Owner, Commonwealth Business Services

Read John's success story.

Once you open the ***Add Client*** window, you can input their information and click ***Save Client*** to create your client account. After your client information is saved, you'll see the ***Client Details*** page that lets you take further actions and control all settings for this client account. All clients are listed in the ***Client Management*** section.



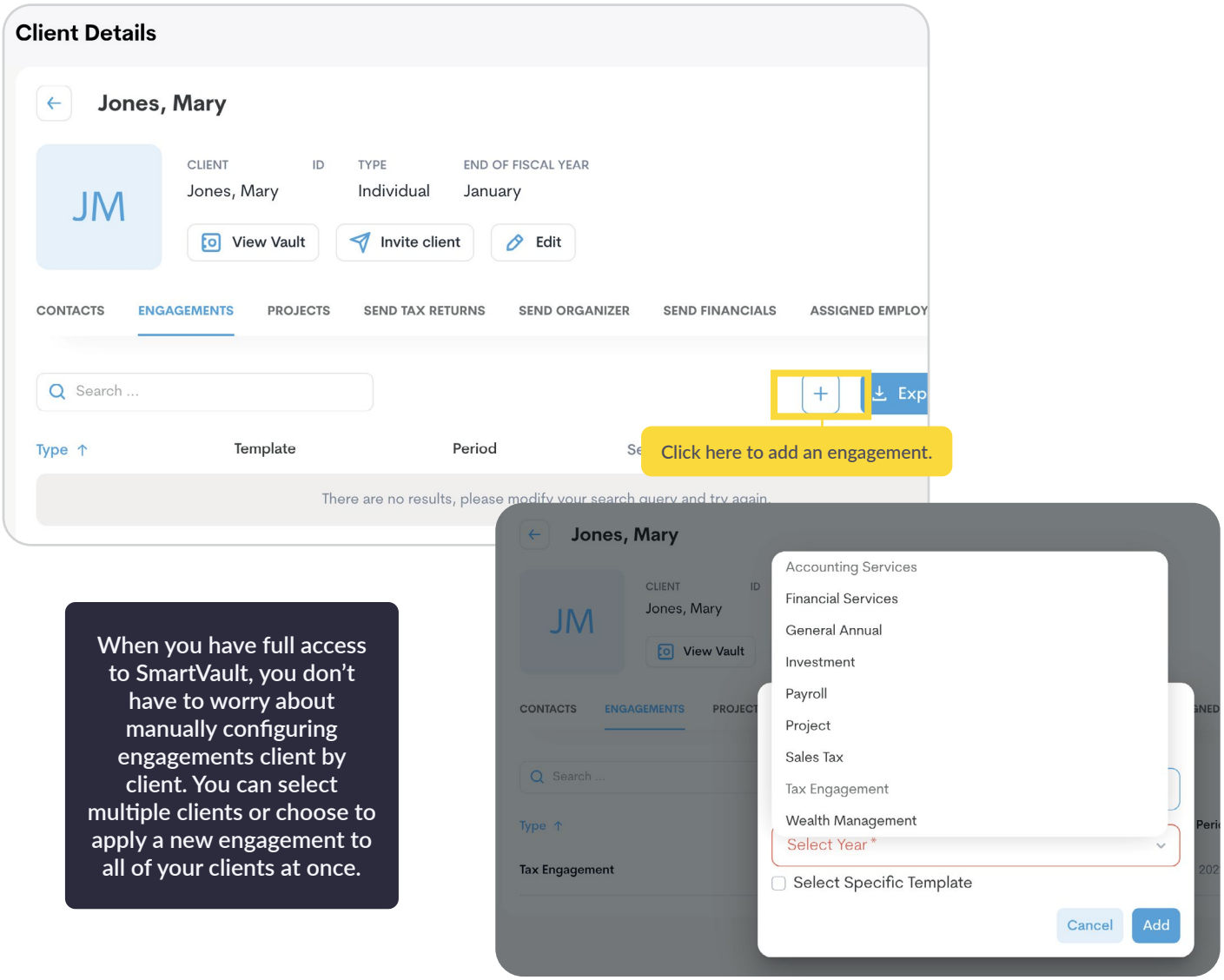
Set Yourself and Your Clients Up for Success

It's important to set your client profiles up correctly. You can qualify a client as a person or entity. Choose person if the client is an individual. Select Entity if your client is a business or organization. If the client is an Entity, you'll then choose a type, such as Estate, Benefit, S Corporate, Partnership, etc. You can even configure the end of fiscal year and designate a tax prepare for each client.

Learn more in *this step-by-step guide* on our online Help Center. We can also walk you through each step. Just *contact us to schedule an assisted trial!*

2-Create Client Folders

There are many ways to create client folders in your SmartVault portal. For accounting firms, the most efficient way is to set up your folders using our ***Add Engagement*** feature from the ***Client Details*** page. You can select your type from a pre-populated list and select the year to which this engagement applies.



When you have full access to SmartVault, you don't have to worry about manually configuring engagements client by client. You can select multiple clients or choose to apply a new engagement to all of your clients at once.

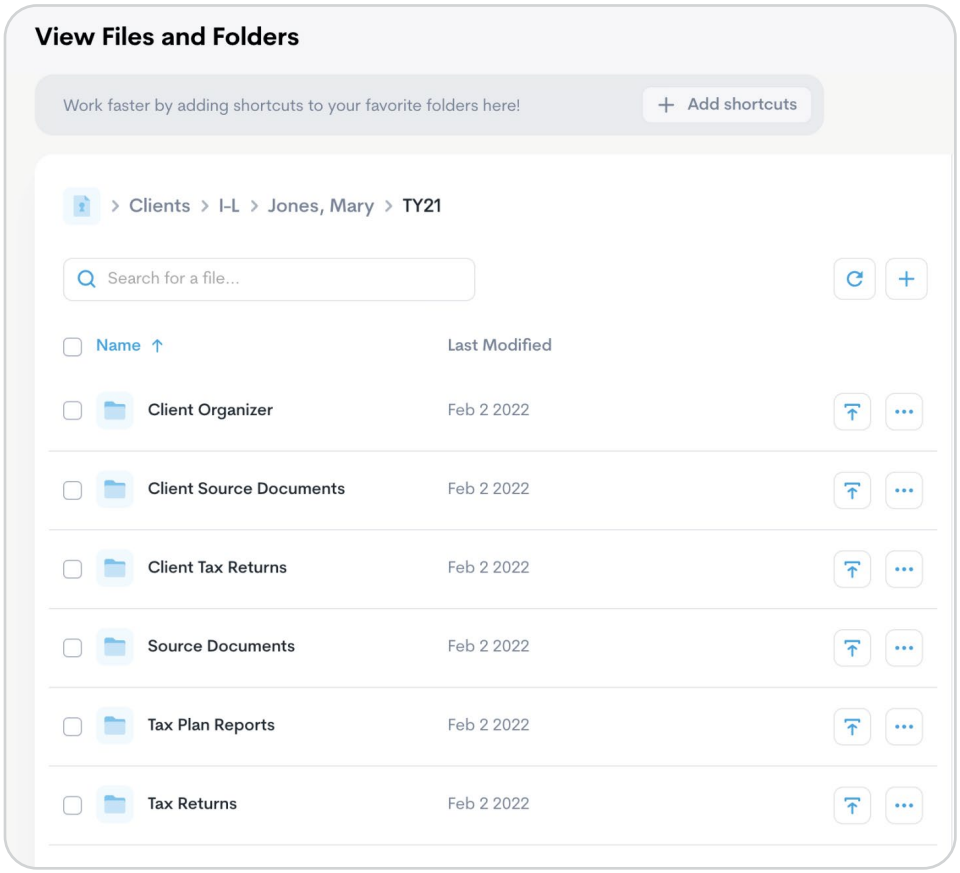
> **"SmartVault makes my life so much easier. My files are at my fingertips at all times, and when my clients need a file, it's so easy to share them!"**

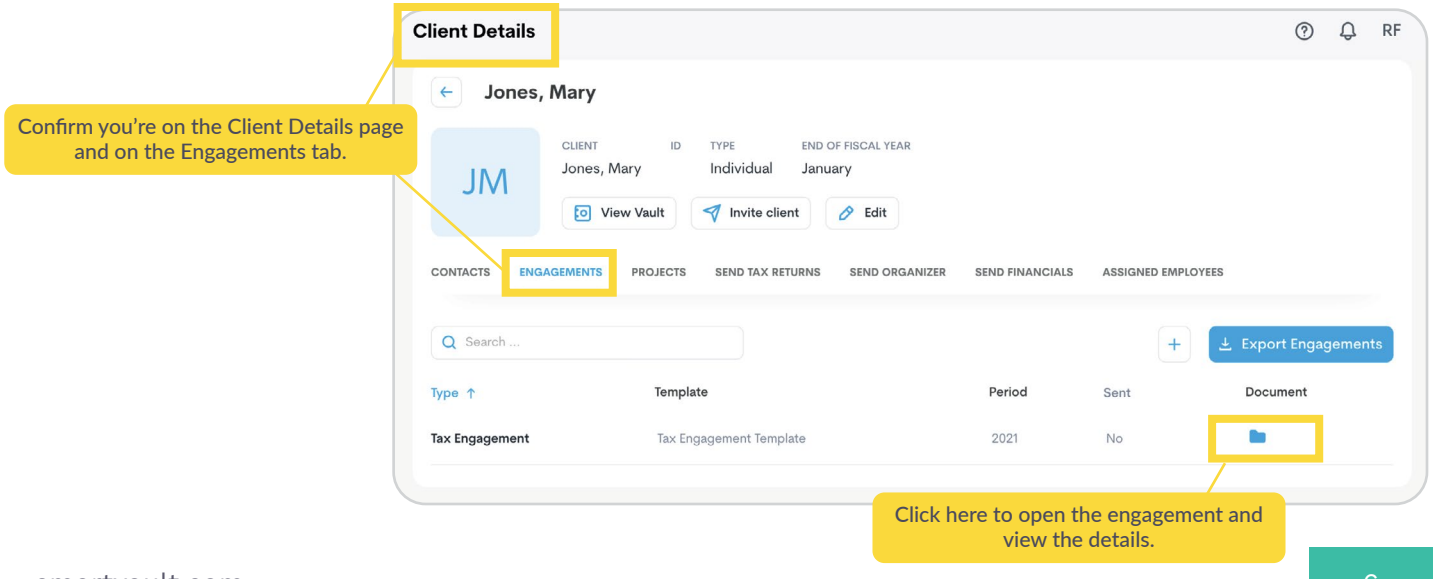
Dawn W. Brolin, CPA, CFE
Owner, Powerful Accounting, LLC

Read Dawn's success story.

When you create a new engagement, SmartVault automatically creates the folders for the engagement, and the folders appear in your client's vault in the Document View pane. The folders SmartVault creates are based on your folder templates. This folder template automation saves you time and creates standardization in your document organization.

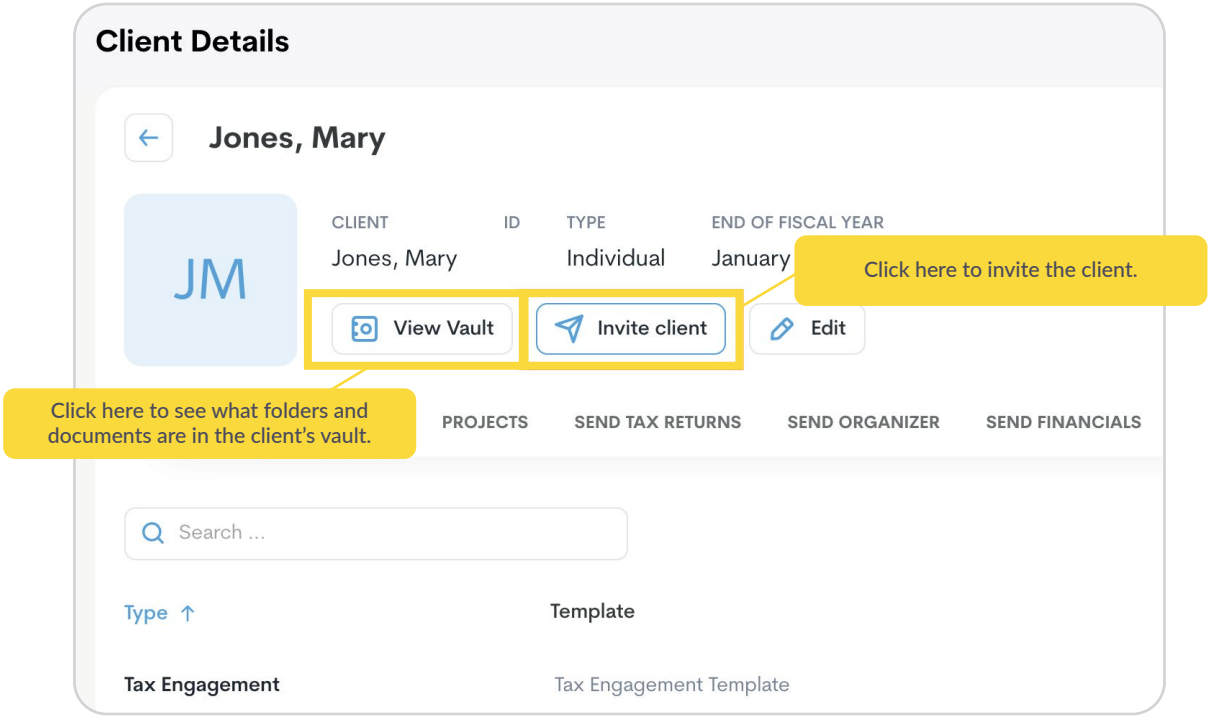
You can open any engagement by clicking on the blue folder icon associated with the engagement under the ***Engagement Tab*** on your ***Client Details*** page.

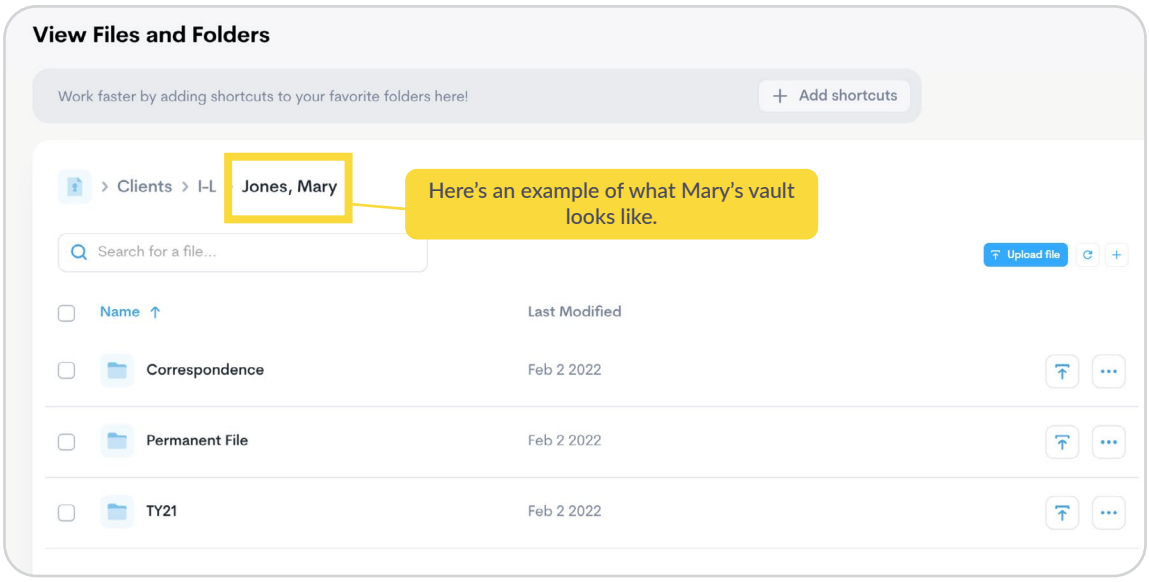




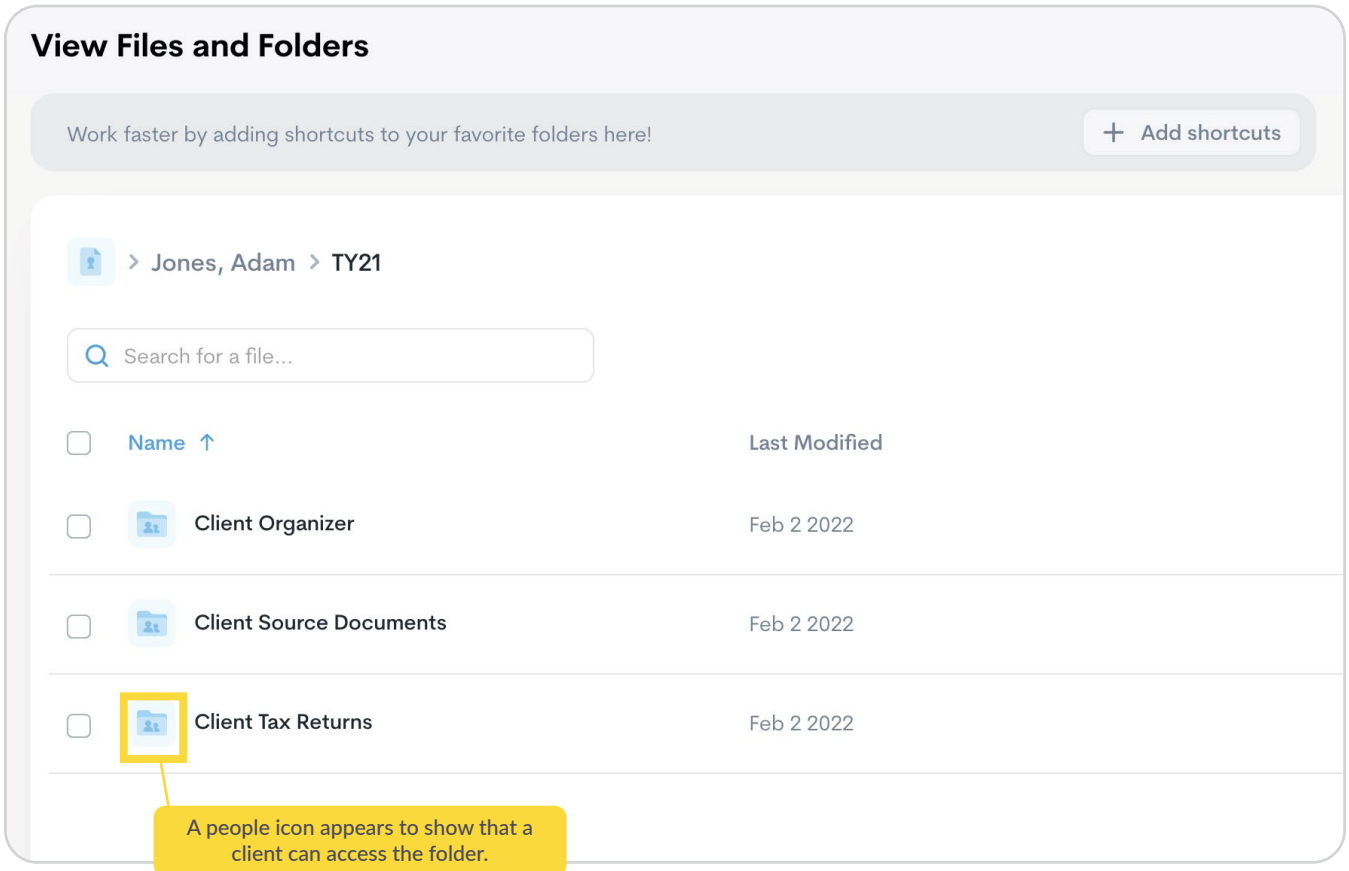
3-Invite a Client

Once you've added the client and created the engagement/folders, it's time to invite clients to their vault. Click the ***Invite Client*** button on the ***Client Details*** page. If you want to see all folders for a certain client, you can do so by clicking the ***View Vault*** button.





After your client accepts the invitation to access their folders, they'll immediately see the shared folders between your firm and them. You will also see a change in the folder icon.





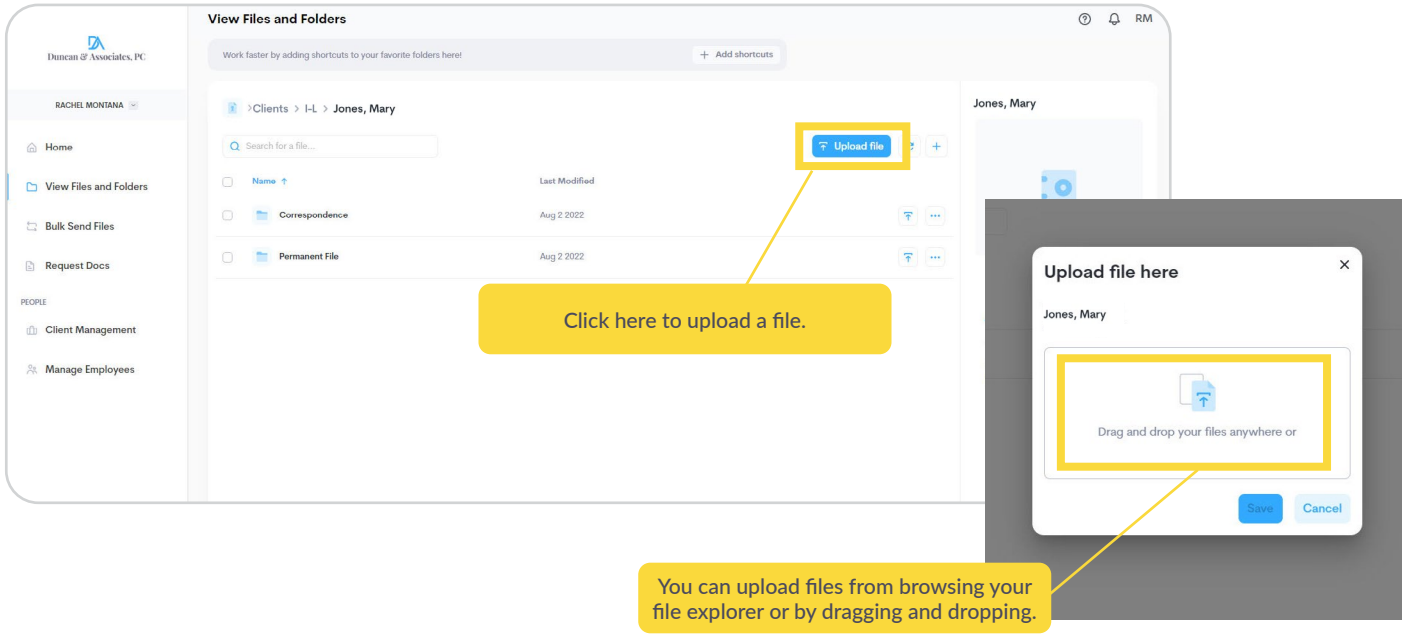
> **"Since we implemented SmartVault we have seen benefits both internally, with our workflows and efficiencies and how we produce our accounts, and more importantly externally, how we interact with our clients."**

Steve Price
Director, BWP Inspire

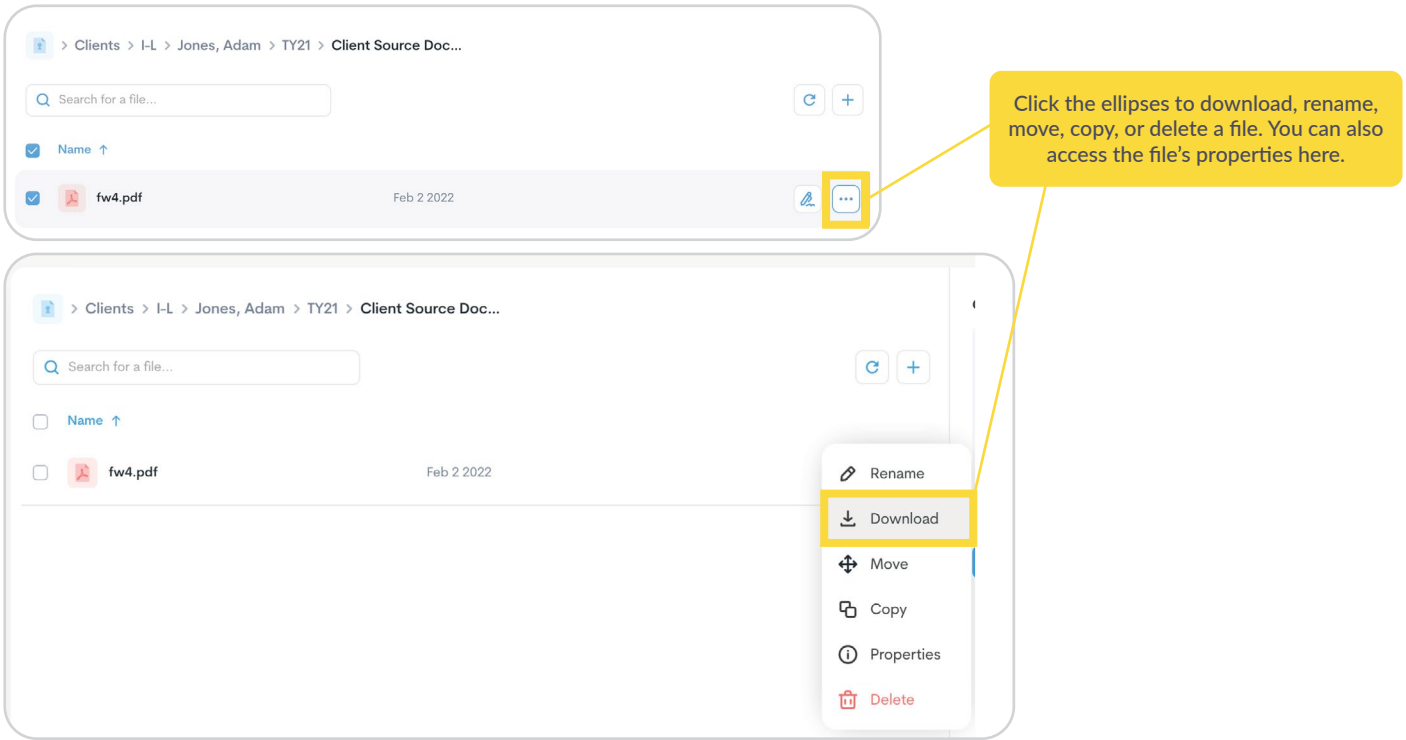
Watch Steve's testimonial video.

4-Upload and Download Files

Uploading files to SmartVault is easy. Click on the ***Upload File*** button and you can upload by choosing files from your file explorer or dragging and dropping them directly into the upload window.



You can easily download any file by clicking the ***control settings (ellipses)*** and selecting the ***Download***.

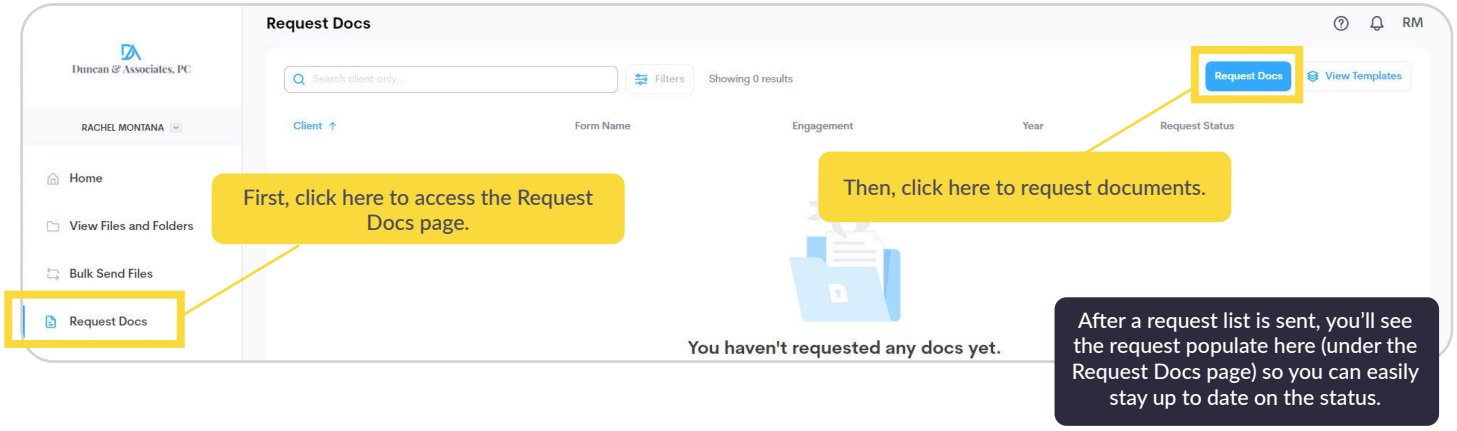


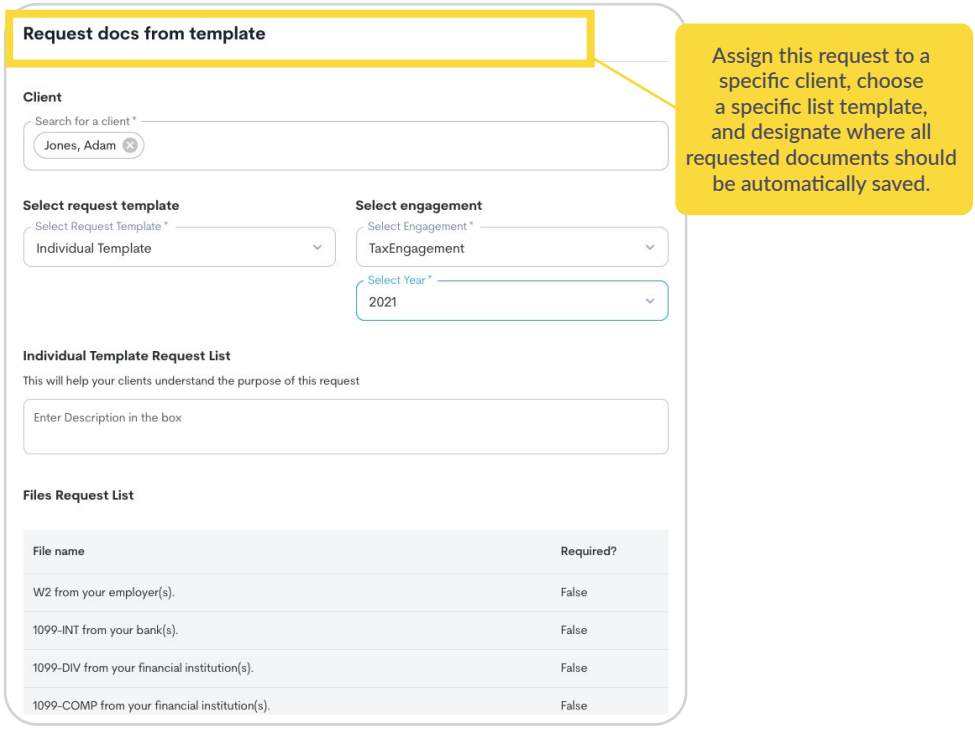
5-Send Document Request Lists Using Request Docs

Request Docs is a key feature in our platform that uses pre-built request lists to collect client documents. You can access all Request Docs features by clicking on the ***Request Docs*** tab from your left-hand navigation panel.

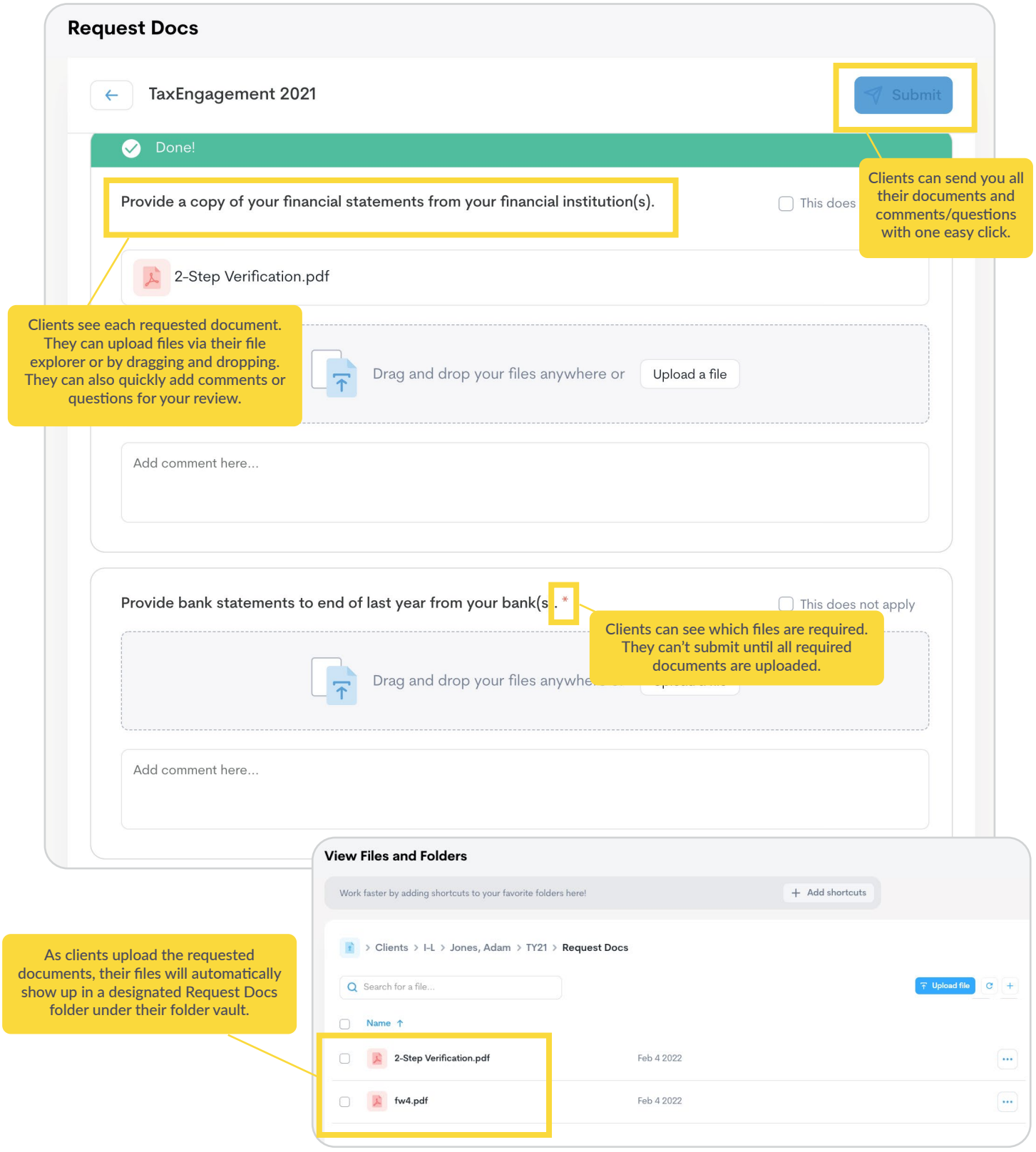
Once you see the Request Docs window, you can click the blue ***Request Docs*** button to send your first request list. When the request list window pops up, you'll be able to assign this list to a specific client; select a specific request list template; and designate a folder destination where all requested documents should be automatically saved.

After a request list is sent, you'll see the request populate under the Request Docs page so you can easily stay up to date on the status.



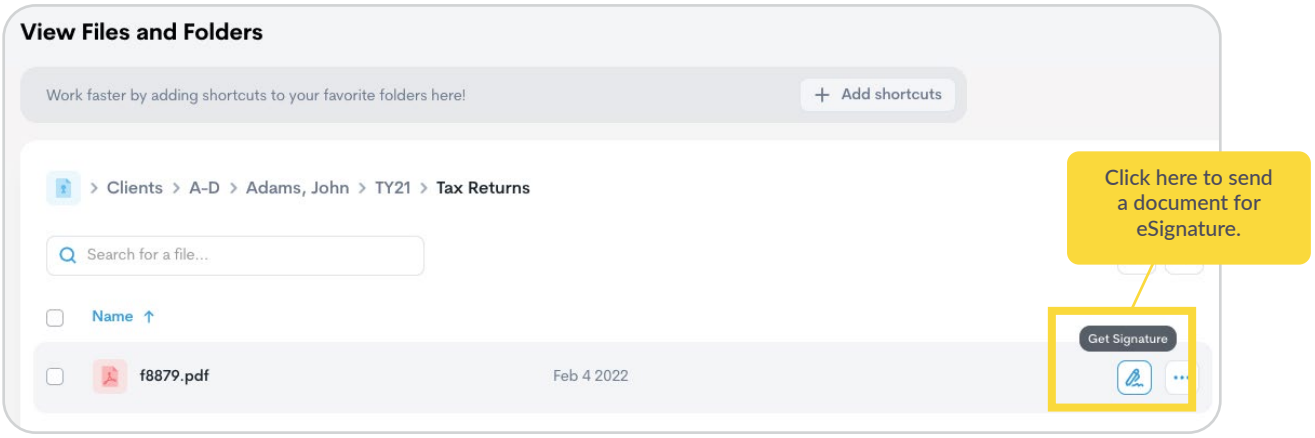


For your clients, once they are invited to upload documents to a request list, they'll see an upload window that outlines all requested documents. This helps make sure they submit everything you need.



6-Send Files for eSignatures

Securely send documents for review and eSignature and collect payments, all through SmartVault's integrated document management and client portal platform. Pay-as-you-go, subscribe, or integrate your existing DocuSign account to SmartVault.





Access On-Demand Resources and SmartVault Product

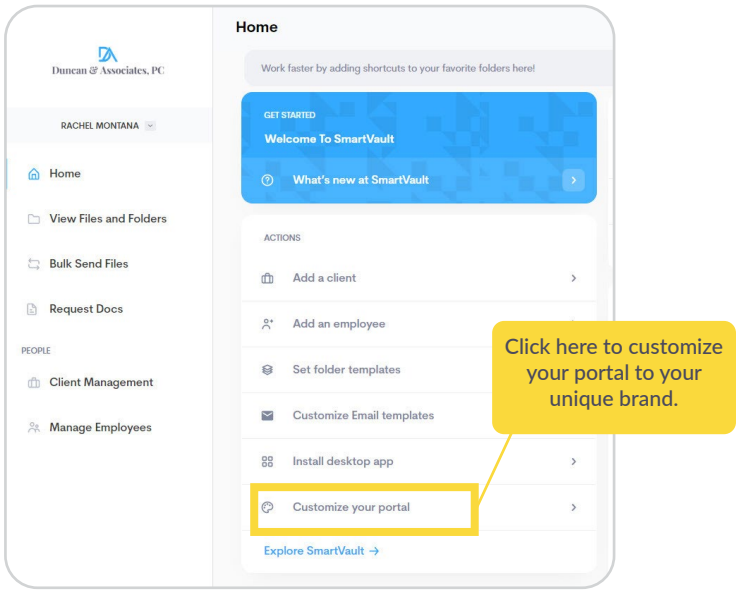
Our *Help Center* has on-demand resources to get you up and running. You'll find easy-to-read "How To" articles, getting started videos, release notes, webinars, and more. You can access these resources during your trial period.

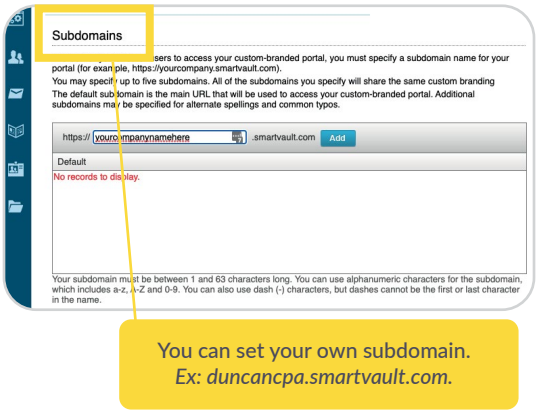
Thinking beyond your trial period, we also have dedicated customer onboarding and success teams based in the US and the UK to ensure you're successfully trained to adopt and implement SmartVault at your firm.

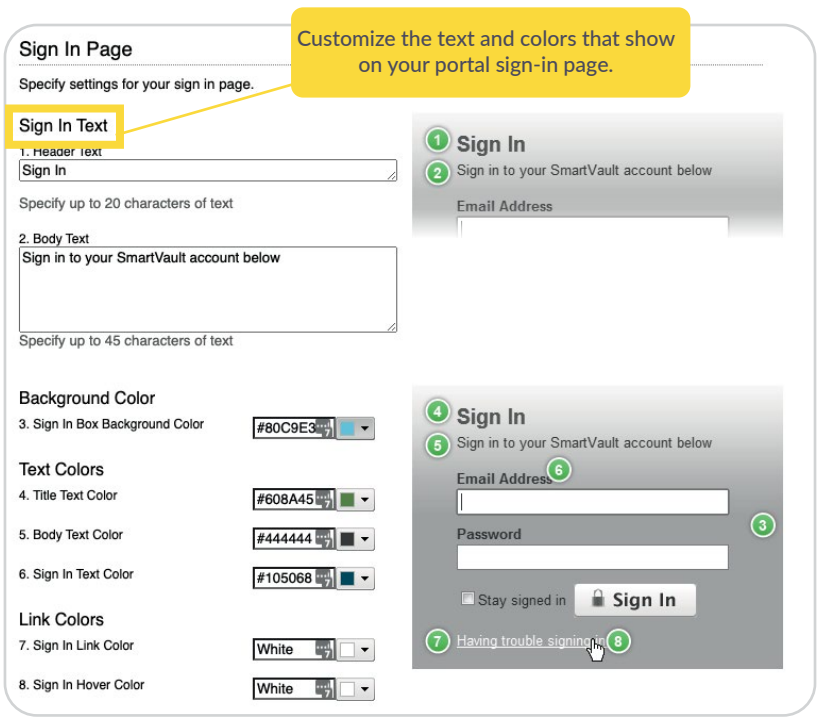
And, if you're making a transition, our customer team provides a white-glove migration service that seamlessly transfers your data into SmartVault. You don't have to worry about losing historical data or committing significant manual hours transferring information.

7-Customize Your Client Portal

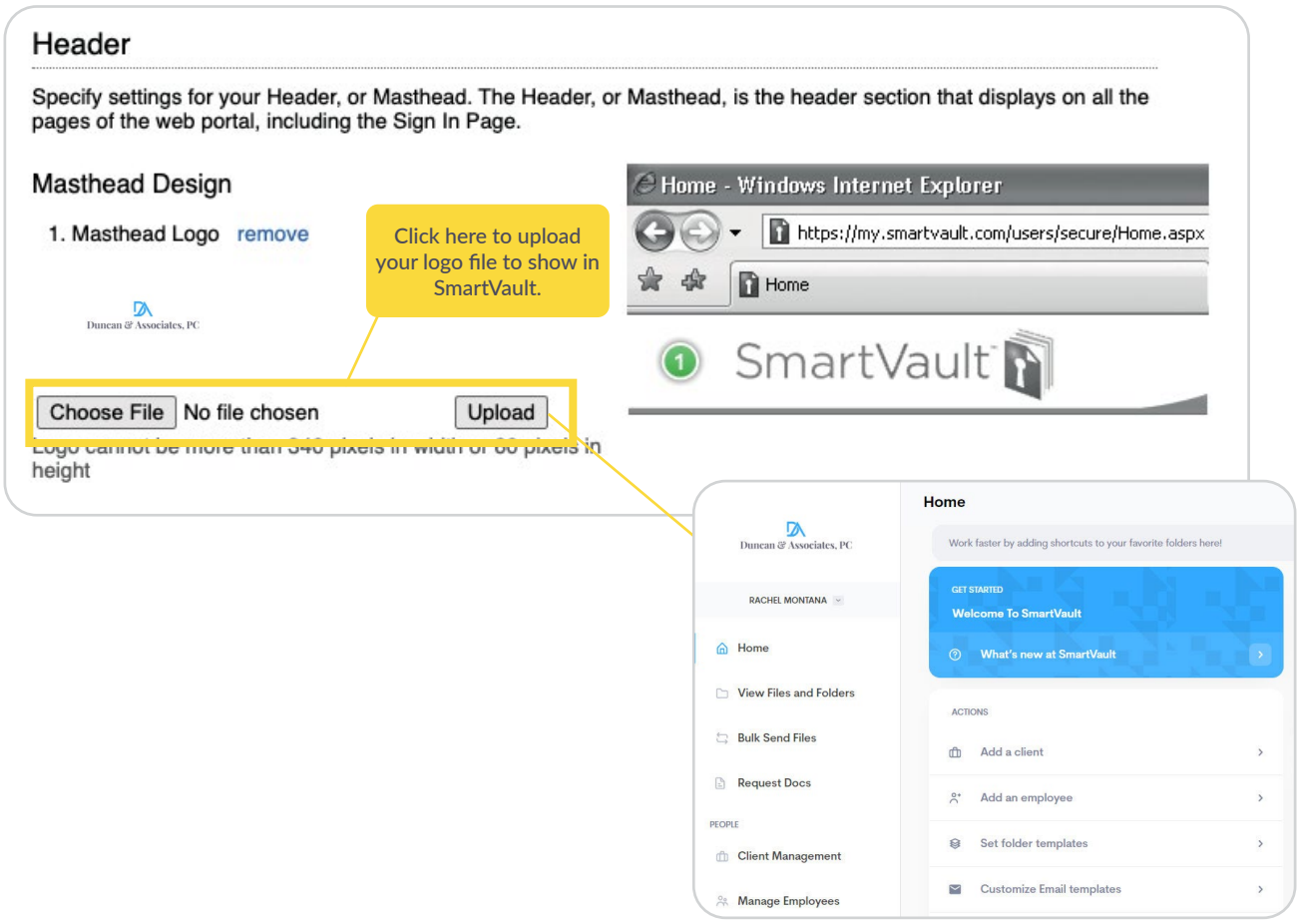
Every SmartVault portal comes with custom branding options that make it uniquely yours. Navigate to the ***Customize Your Portal*** shortcut under the ***Actions*** section on your SmartVault homepage and you'll see the window where you can apply your own branding to the portal. You can then create your custom subdomain and style the portal sign-in page with your own color scheme so it is consistent with the rest of your brand.







Don’t forget to replace our logo in the header with your own to showcase your company’s brand.



> **“I estimate that we’ve boosted efficiency during tax season by at least 90% since implementing SmartVault... I used to survive during tax season. Now, I operate much more efficiently.”**

Michael J. Yuda, CPA

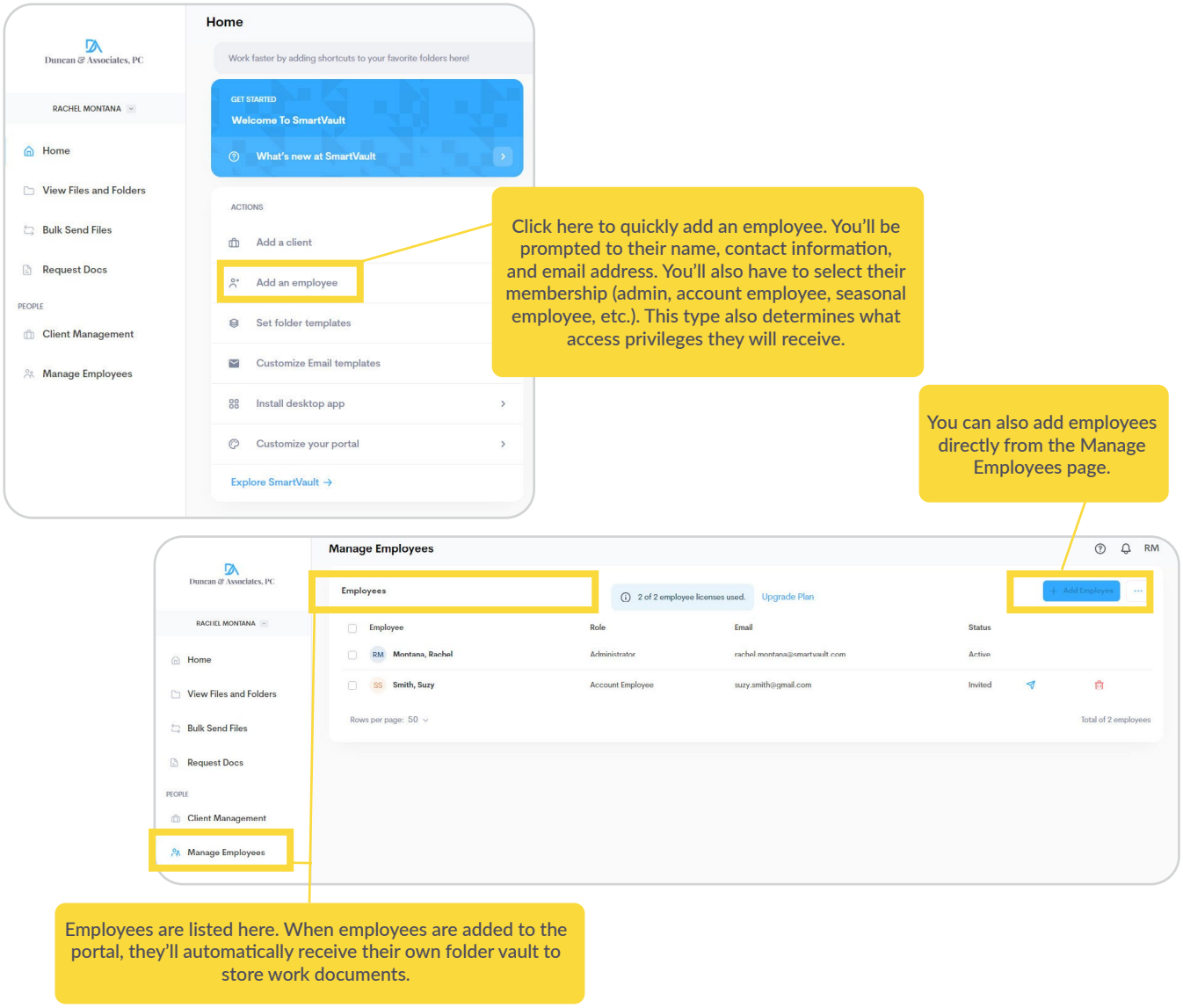
Read Michael’s success story.

II. Collaborating with Your Team in SmartVault

Besides using the portal to collaborate with clients, you can also use it as a permanent online storage solution for all your firm and employee documents. With our unlimited cloud storage, you can save as many documents as you need in the cloud without any fear of running out of space. Our portal is also encrypted with max security protocols so your data is protected while at rest and during transit.

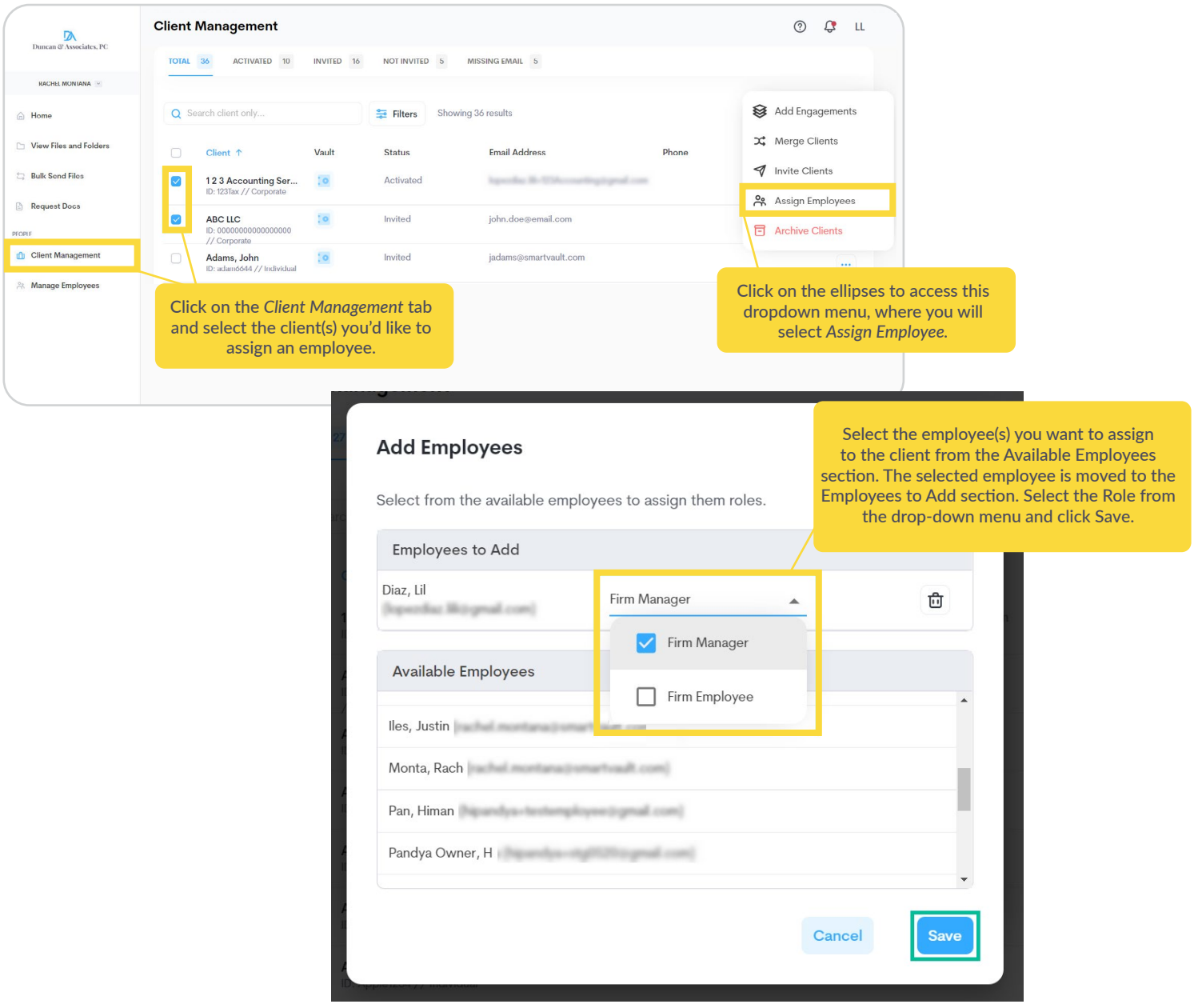
1-Add Employees to Your Portal

Employees are any paid users on your SmartVault account. You can grant access to users through the ***Add an Employee*** shortcut in the ***Actions*** area on the homepage. Once you've input their information and added them, they'll receive an email to activate and access their account.



2-Assign Employees to Clients

Once employees are created, you can assign them to clients so they can easily locate their own client folders and files. This gives you more control over which clients your employees can see and manage.



Let Us Walk You Through Everything Here + More

We'd be happy to show you how to use SmartVault to its fullest potential so you can have a productive trial experience. **Simply schedule a 15-minute personalized demo.** And, feel free to type your questions in the form below and send it to us beforehand at sales@smartvault.com so we can make sure we cover everything in our conversation.

SmartVault

SmartVault helps over 30,000 accountants and their clients securely gather, store, share, and eSign documents in the cloud.

LEARN MORE



Online Document Storage

Standardize and centralize your business documents with smart online document storage.



Secure File Sharing

Make sharing files in the cloud easy and convenient, without compromising on security or compliance.



Branded Client Portal

Give your clients a secure, easy, and professional way to collaborate with you on documents in the cloud.

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