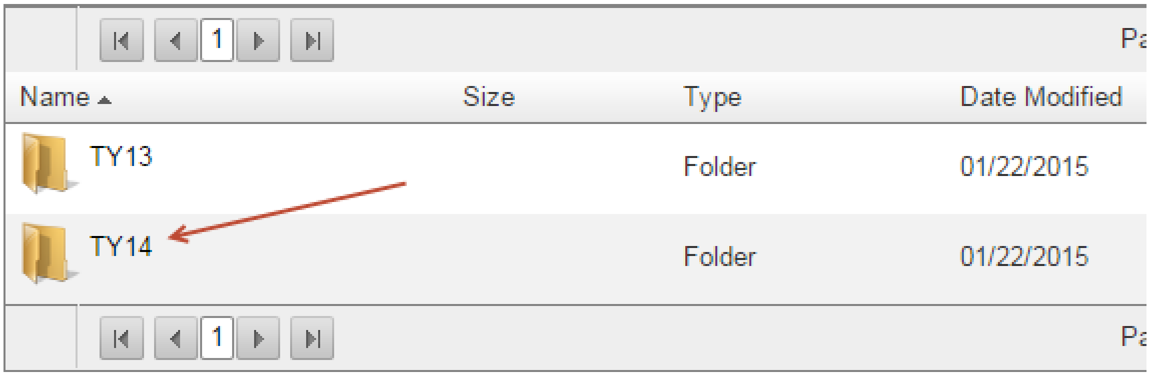
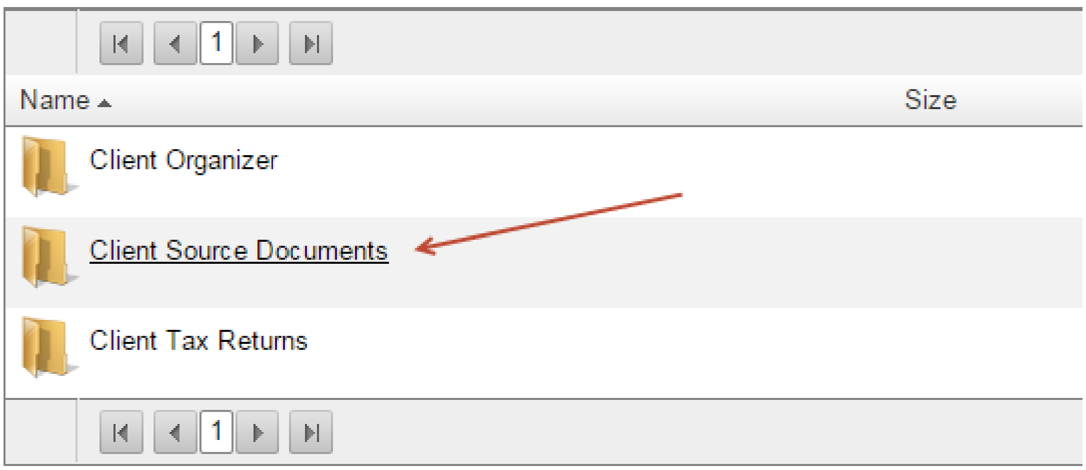
HOW TO UPLOAD FILES TO YOUR SMARTVAULT

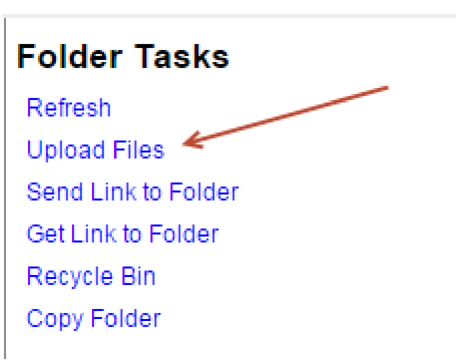
Login to your account, and select the appropriate tax year. In this example, its 2014:



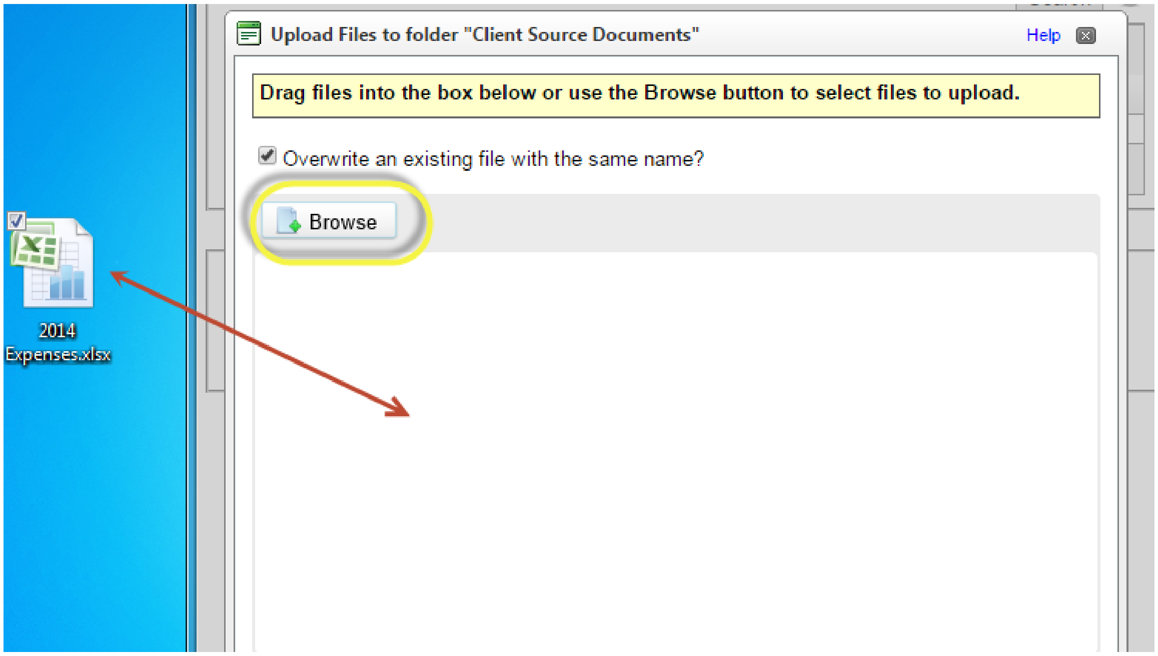

Next, select the folder “Client Source Documents”:



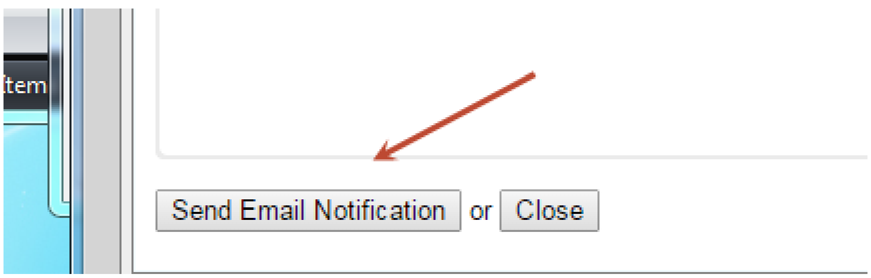

There will be several menu selections available on the far-right hand side. Choose “Upload Files”:



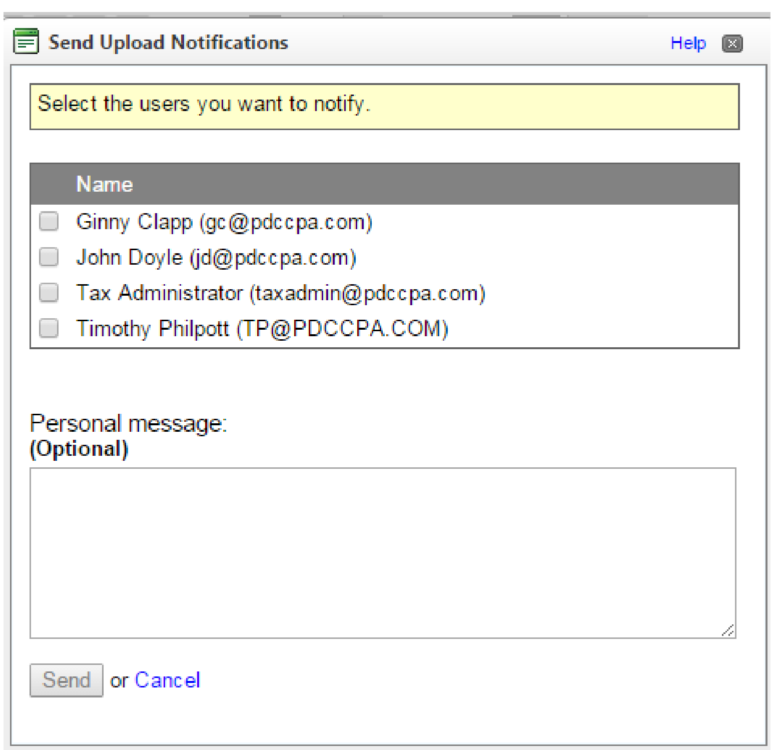

A box will open. You can drag the file(s) you want to upload from your desktop into the box, or you can press the “Browse” button and navigate to the location where the files(s) are located, and select them:



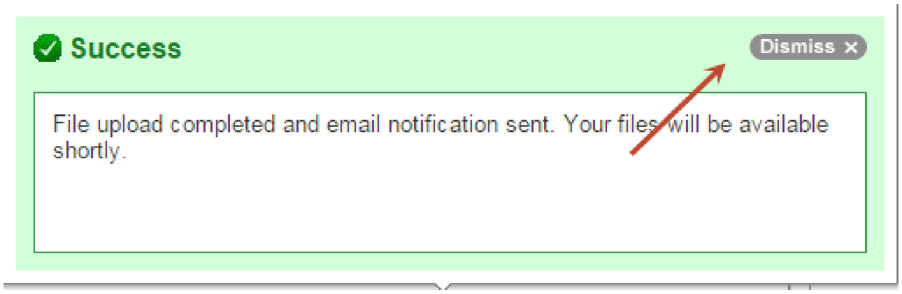

When you are finished uploading the files, press the "Send Email Notification" button so we are notified that you have uploaded files:



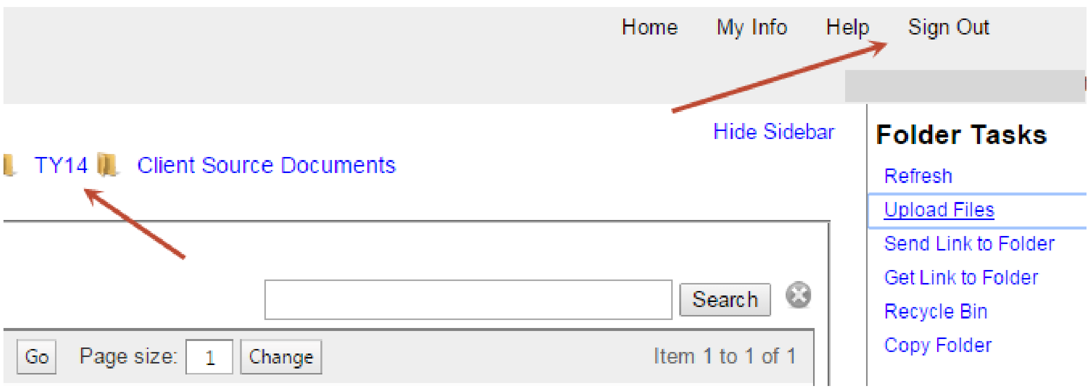

In the next box that opens, select the person you wish to notify of the uploaded information:



You will be given a confirmation that the upload has been successful - click on the “Dismiss” button:




At this point, you can go back to the main Tax Year folder by clicking on the menu above, or you can Sign Out of your account (always recommended before you exit SmartVault):

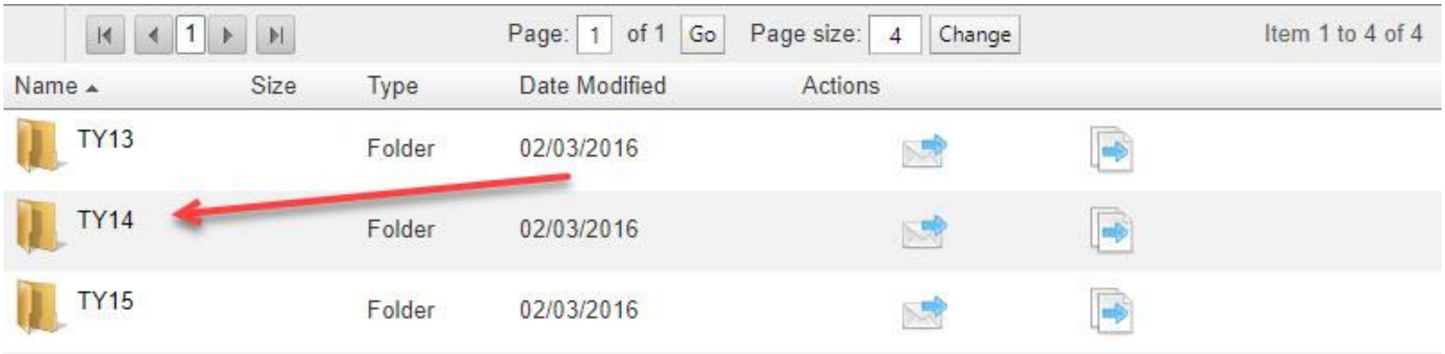



If you have further questions, please contact us:

(781) 942-2950
taxadmin@pdccpa.com

HOW TO DOWNLOAD FILES FROM YOUR SMARTVAULT

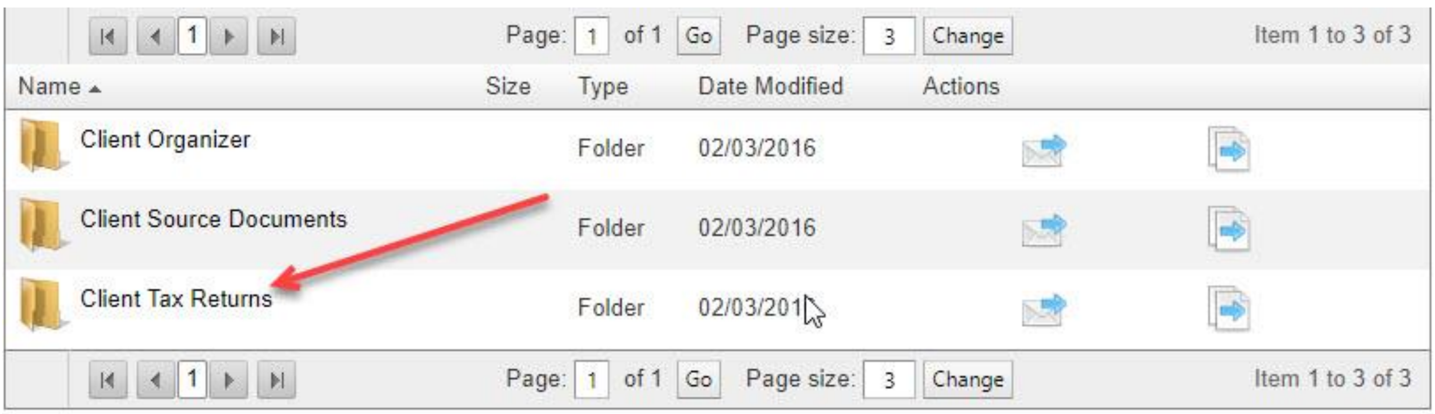
Login to your account, and select the appropriate tax year. In this example, its 2014:



| Name ▲ | Size | Type | Date Modified | Actions |
|---|---|---|---|---|
| TY13 | | Folder | 02/03/2016 | |
| TY14 | | Folder | 02/03/2016 | |
| TY15 | | Folder | 02/03/2016 | |

Page: 1 of 1 Go Page size: 4 Change Item 1 to 4 of 4

Next, select the folder that contains the file(s) you would like to download. In most cases, it will be the "Client Tax Returns" folder:



| Name ▲ | Size | Type | Date Modified | Actions |
|---|---|---|---|---|
| Client Organizer | | Folder | 02/03/2016 | |
| Client Source Documents | | Folder | 02/03/2016 | |
| Client Tax Returns | | Folder | 02/03/2016 | |

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

The files will be listed along the left column with icons to the right of the file names. Click on the download icon to download and save each document to your computer:

| Name ▲ | Size | Type | Date Modified | Actions |
|---|---|---|---|---|
| 2014 Individual [redacted] ClientCopy.pdf | 1,772 KB | pdf | 02/17/2015 | |
| 2014 Individual [redacted] GovernmentCopy.pdf | 1,360 KB | pdf | 02/17/2015 | |
| e-file Acceptance Letter [redacted].pdf | 942 KB | pdf | 02/18/2015 | |

Page: 1 of 1 Go Page size: 3 Change

When you are finished downloading the files you want, just logout of the system