

Using the SmartVault Portal

1. Setting up your account:

You will receive an email titled Benchmark Tax Services has shared the vault “...” with you from the account notify@my.smartvault.com.



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 Your Name will appear here

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.



Click here

[Activate](#)

We are always here to help, so feel free to contact us with questions or feedback.

Click on the “Activate” link to be taken to the SmartVault portal to set up your account. Enter your information and select a password you will remember. Your email and password will be how you sign into your account going forward. Once you’ve confirmed all your information is correct click “Create My User”.

The image shows a registration form for the SmartVault portal. On the left is a teal graphic with the SmartVault logo and an illustration of a person holding a document. The form on the right is titled "Access your documents" and contains the following fields: "First name" (Jane), "Last name" (Doe), "Email" (alexandrarayy+stgclient01@gmail), "Phone number", "Enter a password", and "Confirm Password". Below the password fields is a "Strength" indicator and a note: "Minimum length is 12 characters; must include at least one of each of the following: uppercase letter, lowercase letter, number, punctuation." There is a checkbox for "I agree to SmartVault's Terms of Service" and a green "Create My User" button at the bottom. A red arrow points from the text "Click here" to the "Create My User" button.

Click here

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After clicking on the “Create My User” button, SmartVault will automatically send a verification code to your email. Input the provided code and click submit.

We've sent a verification code to your email address:
a*****6@gmail.com
Check your email and enter the code.
The code will expire in 10 minutes.

Verify Identity

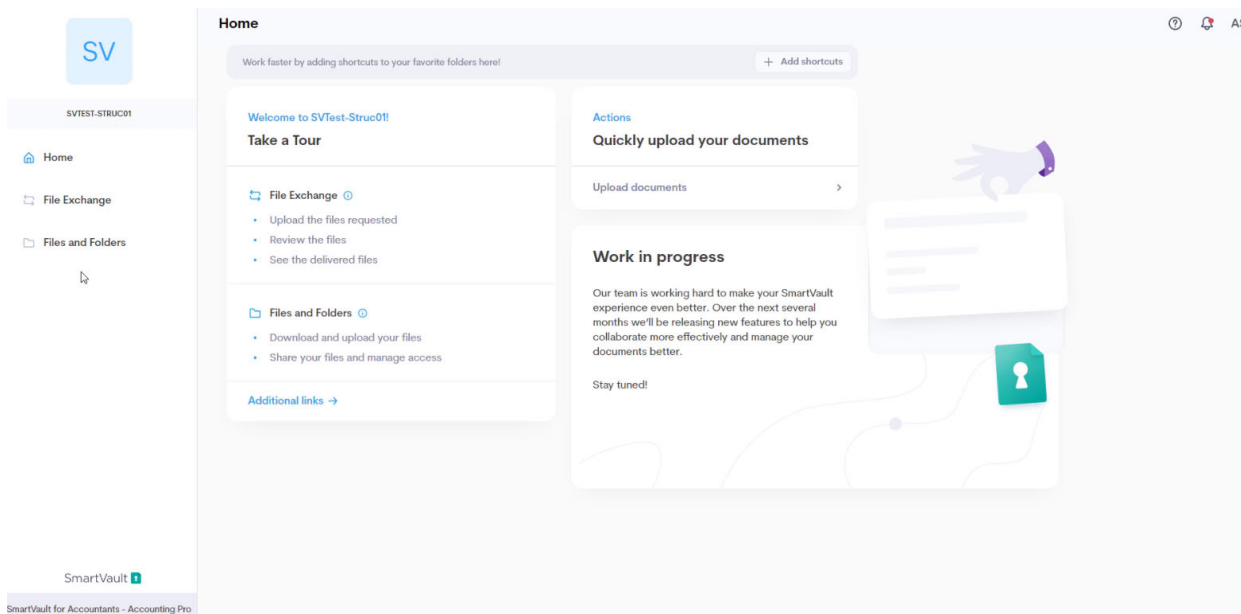
Enter code below

Verification Code

Submit

[Resend Verification Code](#)

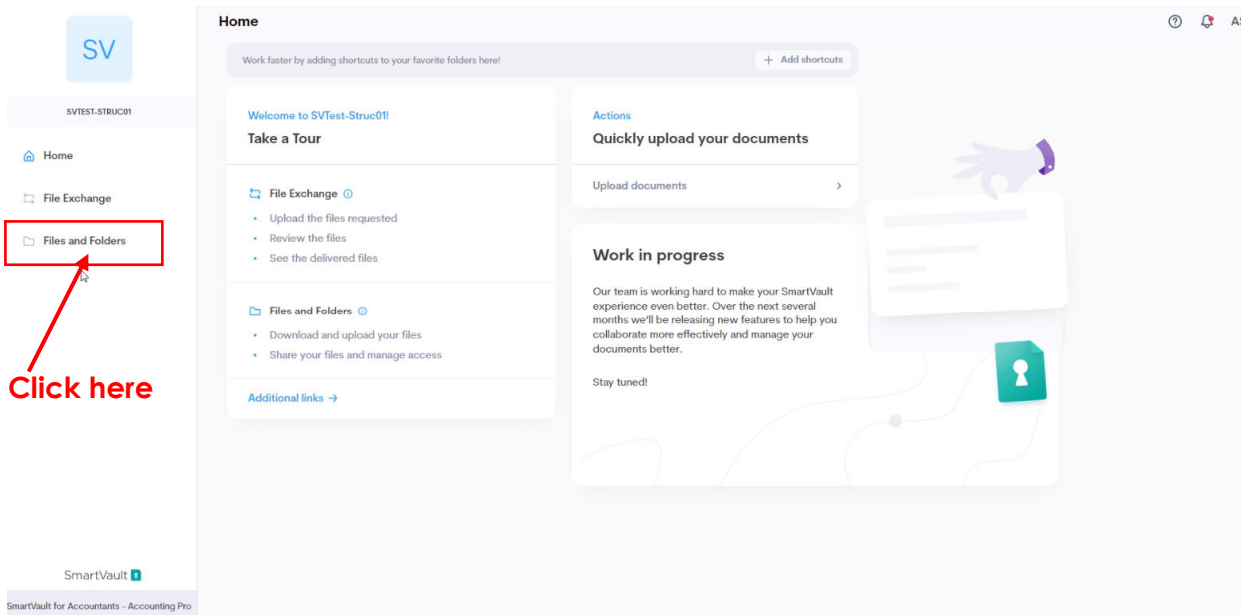
Once you have hit “Submit” you will be taken to the SmartVault home page. This will be the page you see every time you log in to SmartVault going forward.



Using the SmartVault Portal

2. Uploading & Downloading your files:

To start using SmartVault to send us your documents and receive documents from us, you will want to click on “Files and Folders” on the left side of your screen.

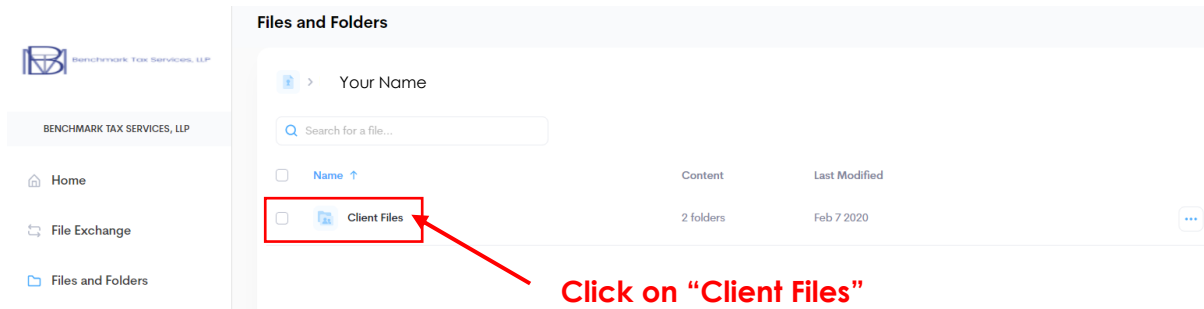


This will take you to the following screen where you should see a folder with your name on it – click on this folder.

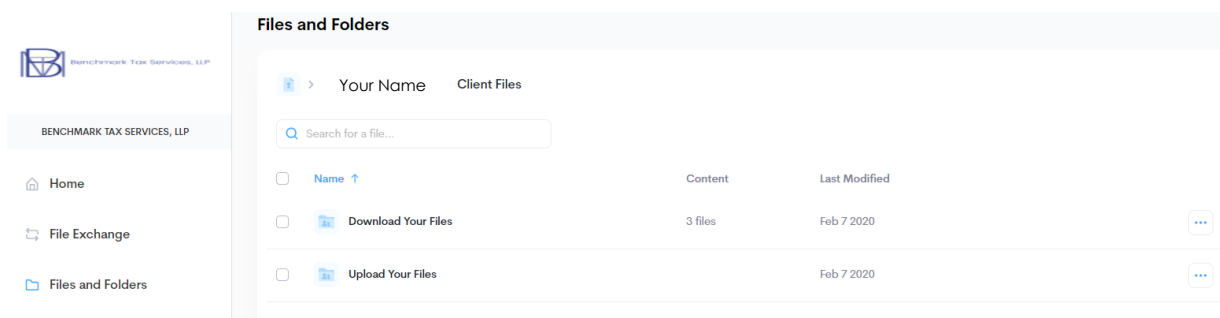


After clicking on your name you should see a folder called “Client Files” (See below)

Using the SmartVault Portal

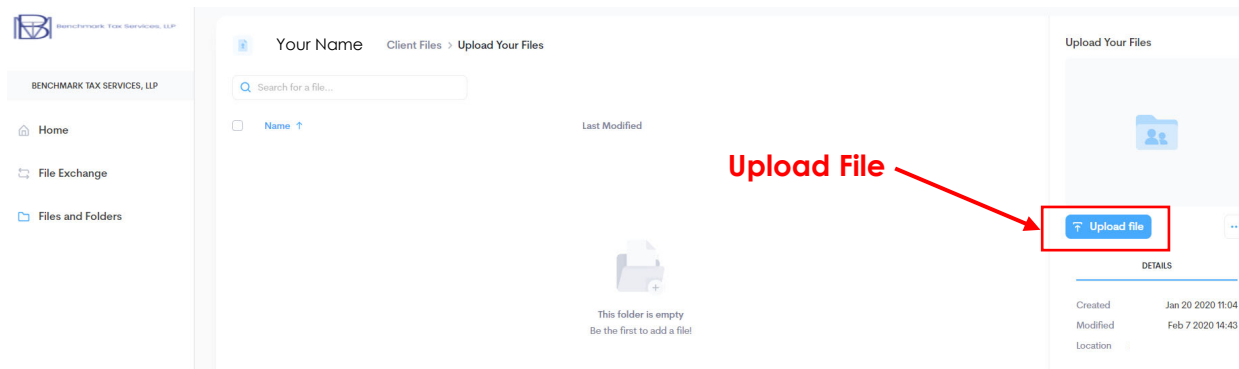


After clicking on "Client Files", you have two options: "Download Your Files" & "Upload Your Files"

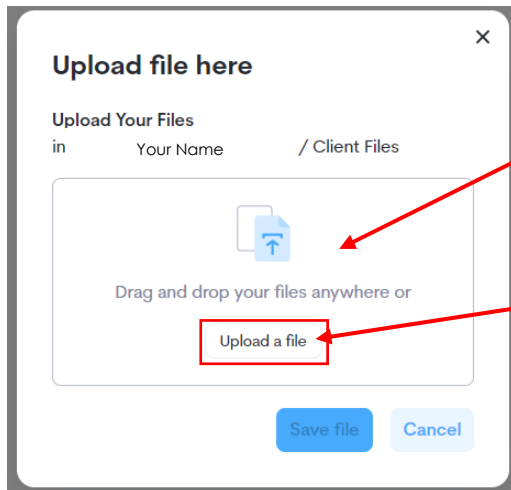


Uploading Your Files (Sending your files to us):

Click on the option to Upload Your Files and you should be taken to the screen below. You will see a blue button that reads "Upload file" to the right side of your screen. Select this button and either a) drag and drop the file from your desktop or windows explorer to the uploader or b) click on "Upload a File" to browse files on your computer.

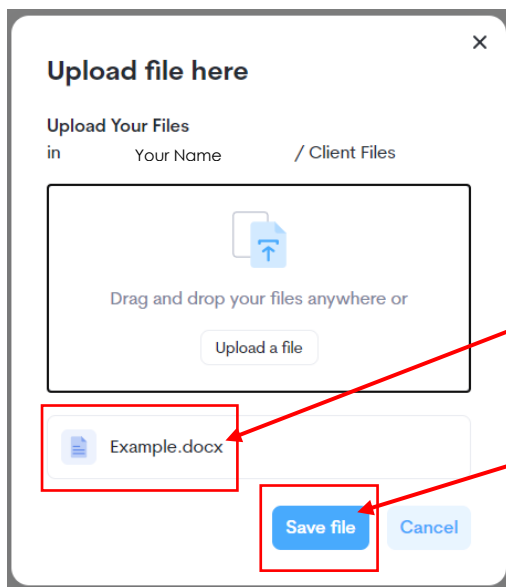


Using the SmartVault Portal



Drag and drop files anywhere in this area

OR click here to browse for the file on your computer

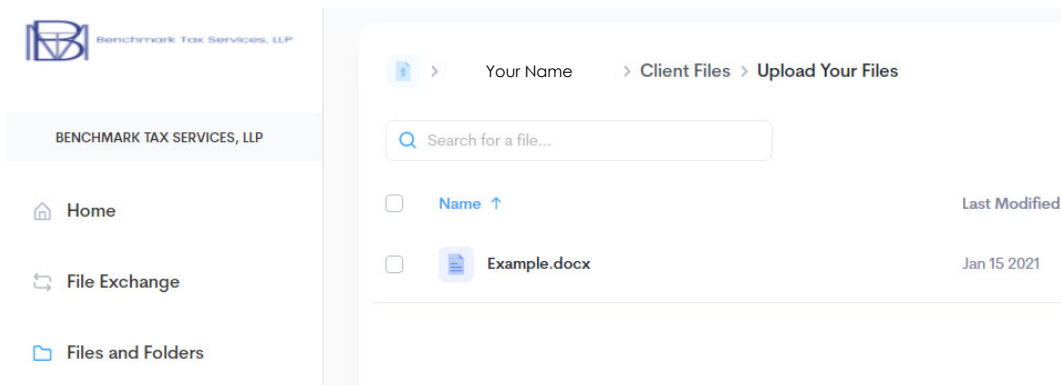


Once selected your file should show up here

Make sure to click "Save file" to finish the process

Once you've selected and saved your file it will show up in the "Upload Your Files" Folder and we will have access to it.

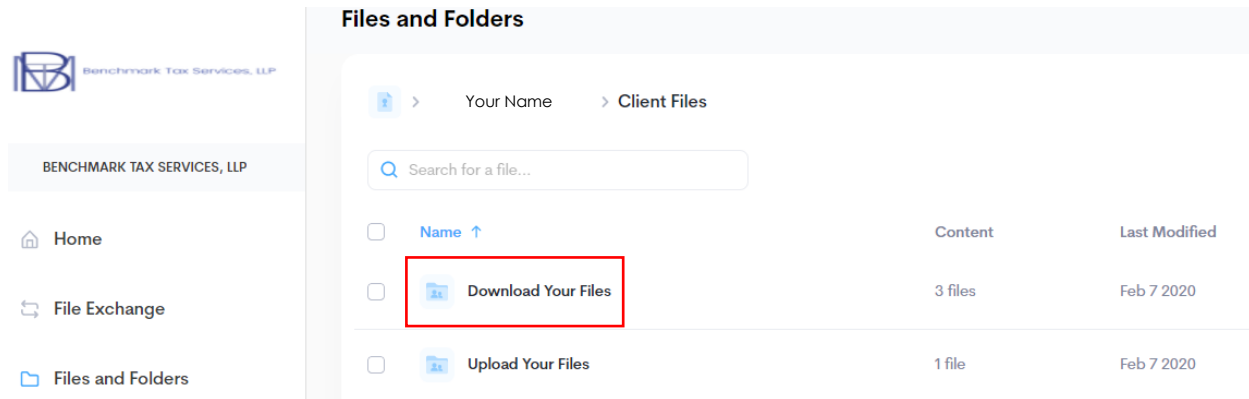
NOTE: If you load the wrong file you will not be able to remove it. Contact us and we will delete it for you.



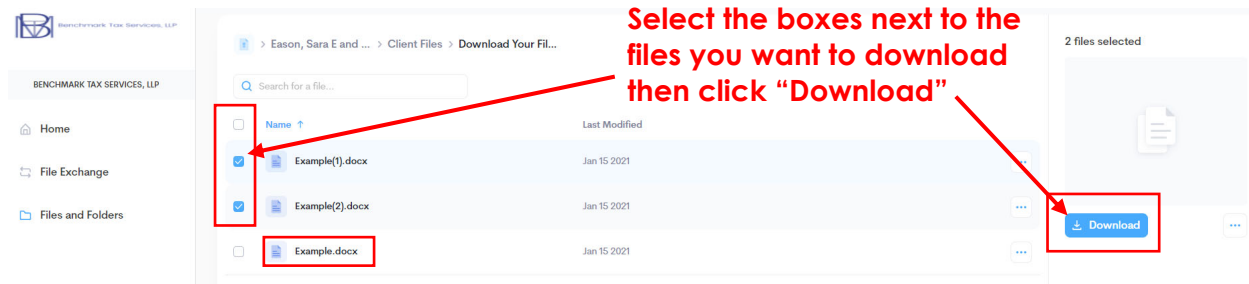
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- **Downloading your Files** (Receiving files we send to you)

Back on the “Client Files” screen select the option to “Download your files”



You will see either a list of files or a list of folders for each year. Select the file you would like to download. If there is a list of folders by year, simply select the year for which you are trying to download your return (or other data).



You can either select the box or boxes for the files you would like to download and then click on the download button to the right of your screen to download these files to your computer OR you can click on the name of the file to open a preview of the document and download it from there.

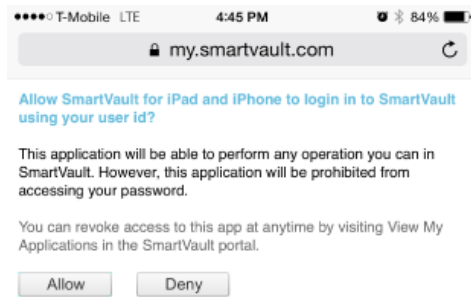


If you have any questions or have difficulty accessing, uploading, or downloading through SmartVault feel free to call us at (405)364-0001.

SmartVault Phone App:

Downloading and Setting Up the App:

A SmartVault phone app is available for free for iPhones and iPads. On your device open the app store and search for SmartVault for iPhone and iPad. Once you have downloaded the app you will sign in using the username and password you created above when you set up your account for your computer. You will be asked to allow SmartVault for iPad and iPhone to login to SmartVault using your user id – touch “allow” to continue.



Description

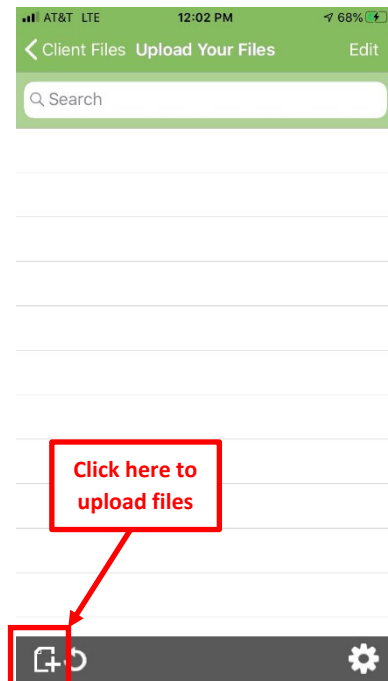
SmartVault is the safe and easy way for businesses to store and share files. With SmartVault, you can access all your documents anytime, anywhere, and from inside your favorite business apps, like QuickBooks and Microsoft Outlook. Today, more than 15,000 users rely on SmartVault to securely store and share all of their busi... [more](#)

You will then be asked if you want to set a SmartVault Passcode. This is a four-digit code you will enter into the application when you sign in. It is recommended but not required to select a passcode.

Uploading using the SmartVault App:

Once you have signed in to your SmartVault account you will click on “Benchmark Tax Services, LLP”, Your Name, “Client Files”, and then “Upload Your Files”. You will click on the icon in the bottom left corner of the screen that resembles a piece of paper with a plus sign. Your phone will ask if you want to take a photo or choose a photo that’s already in your camera roll. Once you’ve selected or taken a photo you’ll be asked to input a name for the file. If you are taking photos of a document that is multiple pages long please add the page number to the title. Then click upload and your good to go! The file will save automatically so you’re free to close out of the app.

- Note: Just as with the desktop version, once you have uploaded a file you will not be able to delete it yourself. Just let us know and we can remove it for you though.



If you have any questions or need help feel free to give us a call at 405-364-0001!