

B & T Services Inc. Smartvault Guide

This is how your Smartvault invitation e-mail will look in your inbox (be sure to check your spam folder)

 **BT Services Inc Matt**
BT Services Inc Matt has shared the vault

The e-mail content will look like the e-mail below. Clicking where the arrow is pointing will lead you to the account creation webpage.

BT Services Inc Matt has shared the vault "[REDACTED]" with you.

BT Services Inc Matt <notify@my.smartvault.com>

Sent: Tue 1/8/2019 1:02 PM

To: info.btbusinessolutions.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.

For your secure Client Portal, our firm has created the vault "[REDACTED]".

Your private 'vault' in the SmartVault Client Portal provides the following benefits:

- Enjoy access to your files any time via the Internet or your Web-enabled mobile device (Blackberry, iPhone, iPad, etc.) Your data is at your fingertips 24/7.
- Relax knowing your data is always backed up.
- Feel confident that your data is always secure. Exchanging files using a client portal is far more secure than sending email attachments. More information about SmartVault's secure platform is available at [SmartVault Security](#).

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](#)

In order to access your secure Client Portal, you need to take just a few simple steps to activate your SmartVault User ID by clicking on this link: [SmartVault Activation Link](#)

We are looking forward to taking the next step in improving our service to you, and will continue to work to earn your business in the coming year. We are always here to help, so feel free to contact us with questions or feedback.

BT Services Inc Matt

**CLICK HERE TO CREATE
ACCOUNT**

CONFIDENTIALITY NOTICE-PRIVILEGED AND CONFIDENTIAL: This communication and any accompanying documents are confidential and privileged. They are intended for the sole use of the addressee. If you receive this transmission in error, you are advised that any disclosure, copying, distribution, or the taking of any action in reliance upon this communication is strictly prohibited. Moreover, any such disclosure shall not compromise or waive the attorney-client, accountant-client, or other privileges as to this communication or otherwise. If you have received this communication in error, please contact me at the above internet e-mail address.

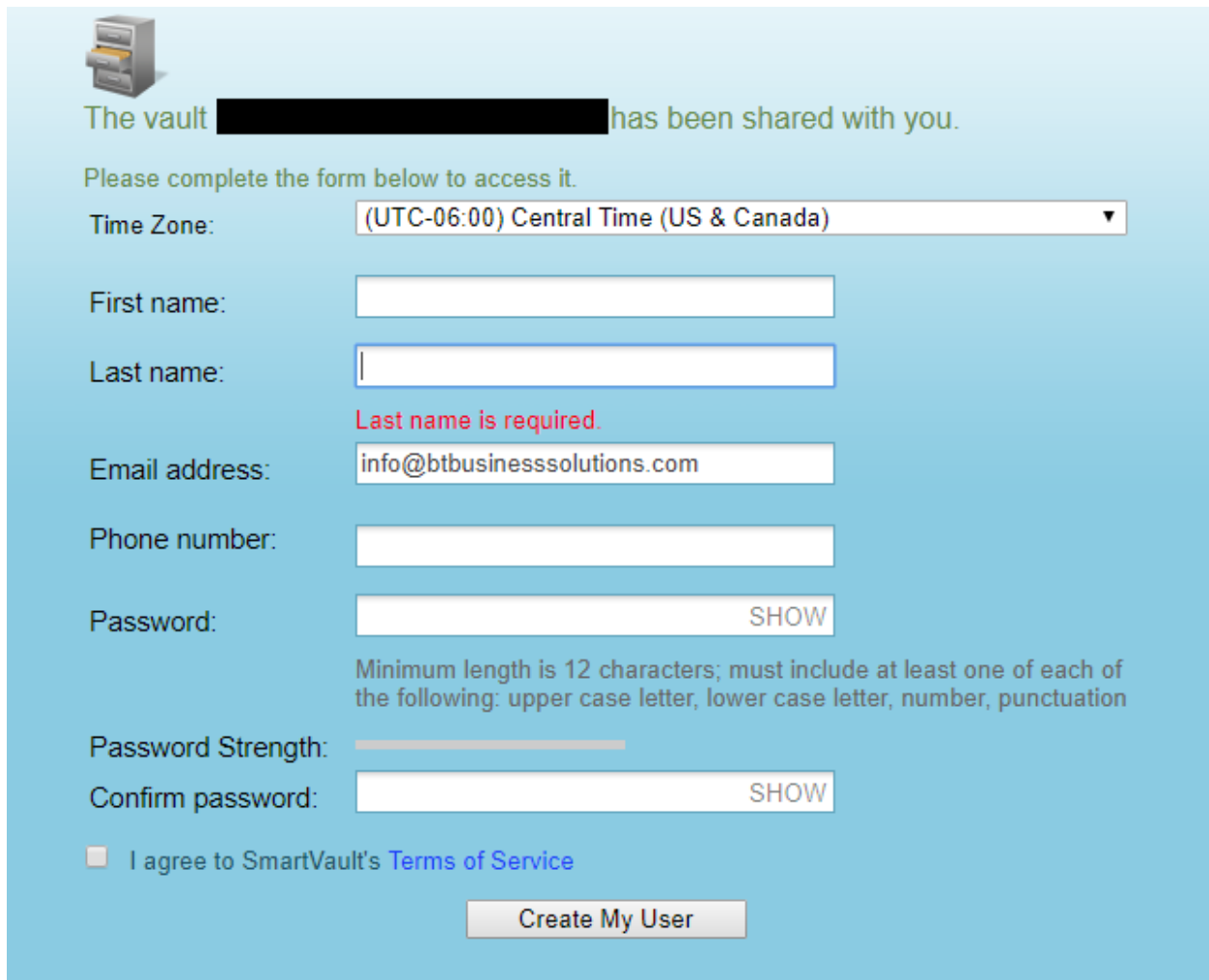
Need Additional Help?

For additional help, go to <https://support.smartvault.com/>.

To submit a support request, go to <https://support.smartvault.com/07Support/02-Contact-Us>.

Responses to this email address are not monitored.

Below is the account creation box. It will use the e-mail you gave us as a Username. The password must be 12 characters including an Uppercase, a number and a symbol
Click create my user button when finished.



The vault [REDACTED] has been shared with you.

Please complete the form below to access it.

Time Zone: (UTC-06:00) Central Time (US & Canada) ▼

First name:

Last name:
Last name is required.

Email address: info@btbusinesssolutions.com

Phone number:

Password: SHOW

Minimum length is 12 characters; must include at least one of each of the following: upper case letter, lower case letter, number, punctuation

Password Strength:

Confirm password: SHOW

I agree to SmartVault's [Terms of Service](#)

After you have created your account you will be brought to the homepage. It will have 2 file drawer icons, one will have your First and Last Name and the other will be labeled public documents.
By clicking on your name you will go to a page that contains your information for different tax years.



B&T Services

Contents for Account B&T Services

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Name	Actions
Lastname, Firstname	
Public Documents	

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

Account: Refresh
Help Re: Getting Sta What's Nev
SmartVa: FreshBook Microsoft O Microsoft W Mobile QuickBook QuickBook Xero

After clicking on your name you will see a screen like the one below.

TY18 is the current year, you can upload tax documents, IRS letters and find your 2018 tax organizer.

TY17 will have your 2017 tax return

TY16 will have your 2016 tax return

TY15 will have your 2015 tax return.

[Hide Sidebar](#)

B&T Services [Redacted]

Contents for Vault [Redacted]

[Click here to go back to last page](#)

Search [X]

Name	Size	Type	Date Modified	Actions
TY17 ←	Prior year Folder	Folder	08/09/2018	
TY18 ←	Current Year Folder	Folder	12/12/2018	

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

My Notification Settings for Vault [Redacted]

- Email me when a new file is uploaded to the folder.
- Email me when a file in the folder is viewed or downloaded.

All of the TY folders will have the same three folders as below. Below is an example of the TY18 Folder

Client Organizer folder: Contains your full length Tax organizer

Client Source Documents: Contains any tax documents or IRS letters you uploaded for us, and is the folder where you upload tax documents.

Client Tax Return: Contains your completed tax return for that year.

B&T Services [Redacted] TY18

Contents for Folder TY18

[Click to go back to prior pages](#)

Search [X]

Name	Size	Type	Date Modified	Actions
Client Organizer ←	Click here to access your 2018 Organizer	Folder	12/12/2018	
Client Source Documents ←	Click here to upload 2018 Tax Files	Folder	12/12/2018	
Client Tax Returns ←	Will have your 2018 tax return when completed	Folder	12/12/2018	

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

My Notification Settings for Folder TY18


- Email me when a new file is uploaded to the folder.
- Email me when a file in the folder is viewed or downloaded.

Below is a view of the Client Source Documents folder. The upper left hand has a button called upload File that allows you to upload a digital copy or photo of a tax document to share with B&T Services. It will also display all the files that have already been uploaded.

If at some point after filing your 2018 taxes you need access to tax documents such as W2s, this is where you could find a copy.

B&T Services [redacted] TY18 Client Source Documents

Contents for Folder Client Source Documents

 [Click here to upload files for Tax Preparer, Tax files or IRS letters](#)

Page: 1 of 1 Go Page size: 1 Change

Name	Size	Type	Date Modified	Actions
No records to display. File will appear here when uploaded				

Page: 1 of 1 Go Page size: 1 Change

My Notification Settings for Folder Client Source Documents

- Email me when a new file is uploaded to the folder.
- Email me when a file in the folder is viewed or downloaded.

After clicking Upload File you will see a box appear like the one below.

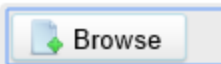
You can either click the browse button to search your computer folders for a file or drag and drop a file in the box to upload a tax document. You can upload more than one file at a time.



We would appreciate it if you then clicked the Send Email Notification button to alert us you have uploaded a new document for review.

Upload Files to folder "Client Source Documents" Help

Drag files into the box below or use the Browse button to select files to upload.

Overwrite an existing file with the same name?

 [Click to choose file\(s\) to upload](#)

 [redacted] 2018 W2.pdf 

File(s) will appear here after you choose it

Click to send B&T Services an e-mail that you uploaded a new document

or