

SMARTVAULT INSTRUCTIONS

To Activate SmartVault

- Check your email for your invitation (from jodi@dow-tax.com).
*NOTE: If you did not receive an email, please contact us.
 - Click “Activate” in the body of the email.
 - Create Username & Password.
Username: _____
Password: _____
- You can now upload and download documents from SmartVault!

To Upload a Document (Send)

- On the Home Page, click “Upload A Document”.
 - Locate the *Client Source Documents* folder and Click “Upload File”
 - Click on the blue upload arrow
 - Choose your file to upload
 - Click “Open”
 - Click “Save”
- Your file is now downloaded to the Portal and your accountant can view it!

To View or Download Your Tax Documents

- On the Home Page, click “View Your Documents”.
 - Click on your Name/Company Name
 - Choose the folder you would like to view (*Income Tax, Bookkeeping, Payroll*)
 - Choose the folder corresponding to the year you would like to view
 - Choose the folder corresponding to what type of document you would like to view
 - Click your selected document
- Your file is ready to view or download!

Need Assistance? Contact our Office Administrator, Jodi Riveira!
Email: jodi@dow-tax.com
Phone: (405) 372-7744