WBWilson Tax Service

Instructions for Initial Set-up and Uploading Files into Your SmartVault Client Folder

You should have received an e-mail from “Bill” with the Subject line of: “Bill Wilson has shared the vault ‘[your name]’ with you.” If you don’t see this in your Inbox, please check your Spam folder before contacting me.

That e-mail will have a link for you to click in order for you to get to your SmartVault client folder (it is suggested that you save that link in your Favorites). You will first see a sign-on screen requesting the following info:

- First Name
- Last Name
- E-mail address (which will already be populated)
- Phone number
- Password (you create your own on the initial sign-in). Please remember this password for future sign-ins.
- Confirm Password

After you sign-in, you should see the "**TY17**" folder (if you don't see this folder, click on your name first.) Click on the "**TY17**" link (not the yellow folder).

You should then see three additional folders - all beginning with the word "Client." Click on the folder named "Client Source Documents" (should be the middle of the three.)

Click on the "Upload File" button (upper left on the screen). A smaller dialog box should open up. From here, you can either drag and drop a file, or use the "Browse" button to search for your selected file(s) in your list of folders.

Click "Send E-mail Notification" in the dialog box so that I am aware of your file upload; writing a brief message optional.

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