



## 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 Wilson**” 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 an “Activate” 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 “**TY20**” folder (if you don't see this folder, click on your name first). Click on the “**TY20**” link (not the blue icon).

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.) On this screen you will load your files.

You can either “drag and drop” your files from a source folder on your computer or mobile device, or you can click on the “browse” link to locate the file on your computer or mobile device. You can also click on the small “upload to cloud” icon located on the gray “Files and Folders” bar.

After you have finished uploading all of your tax documents and related files, click on the “gear” icon on the right side of the gray “Files and Folders” bar. Click on the fourth selection, “Send Link.” Check the box by my name “Bill Wilson” only. Writing a Personal message is optional. Click on the “Send” button below the “Personal message” box. At this point, I will receive an e-mail letting me know that your files are ready for me to view.