



WBWilson Tax Service

Instructions for Uploading Files into Your SmartVault Client Folder

Go to this link:

<https://wbwilsontaxservice.smartvault.com/users/secure/Home.aspx>

(If you have forgotten your password, you can reset it as follows: go to this [link](#) and enter your e-mail address that you use for your SmartVault ID, and then hit the "Submit" button. You will have a new password sent to you at the e-mail address that you use for your SmartVault ID.)

In your SmartVault client portal, 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.