Activating and Using your SmartVault Guest Account

GUEST USER

Welcome to SmartVault! As a guest user, you've been invited to securely access shared folders, files, or documents. This guide will help you activate your account and get started.

Wait for your Activation Invitation

Your accountant or document preparer initiates the process by inviting you to create a SmartVault guest account. To locate and identify the activation email, here are some key details to look out for:

- **Sender:** The activation email will come from your SmartVault account manager, who invited you to create your guest account.
- **Subject Line:** Look for an email with the subject line "[Name of the SmartVault account manager] has shared the vault '[Your Name]' with you".

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\rightarrow Note

Please check your spam or junk mail folders if the activation email is not in your primary inbox. If you have not received your activation email, contact the person who invited you to resend the invitation.

Activating your Guest Account

Once you have received the activation email from SmartVault:

1. Open the activation email.

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	Inbox	23	Primary	Canva, BrandCrowd
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2. Click the Activate button. (It will display the SmartVault logo.)

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	D= Sant	1		SmartVault 🖸		
	v More			To provide you with a safe and secure way to share files with our firm, we have p	erneed with SenerGoult, an associationing online document storage and secure file sharing solution, to crea	ate a Client Partel
Labels	+		For your secure Client Portal, sur firm has created the wald "Konis, Mile(1)". Enjoy access to your files any time through the Client Portal. Your data is always	booled up and exchanging files in the client partial is secure, unlike email attachments.		
				The analysis creat paralisis also very easy to use, in you can clear a link in an Please clear the "Arthous" buffer to finish your account arthousing	ense, yee can ese ornarroadit to access year nes. Its really that easy, i or a question of the client Pariat, i	and here: <u>Charles of Station</u>
				We are always here to help, so feel free to contact us with questions or feedback		
				Need Additional Help? For additional help, contact our Smorthinal Support Town		
				Responses to this email address are not monitored.		

- 3. On the activation page:
 - Enter your phone number.
 - Choose a secure password.
 - Your name and email will already be pre-filled.
- 4. Click Create My User to complete the setup.

	The Vault has been shared w	ith you by . Please complete the fo	rm below to
	create your user and access	your documents.	
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	Lili		à
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	lowercase letter, number, punctuation.	include at relations of sach of the following, a	Approved to the former,
	I agree to SmartVault's Terms	s of Service	

Signing In to your SmartVault Guest Account

Now that you've activated your account, you can start using SmartVault.

- 1. Go to <u>my.smartvault.com</u> or open the SmartVault Connected Desktop.
- 2. Enter the email address and password you used during activation.
- 3. Click Sign In.

\rightarrow Note

If you have forgotten your password, click Can't sign in? and follow the instructions to reset your password.

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Dassword	
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🗹 Remember email	🔒 Sign In

By following these steps, you can set up your SmartVault guest account and start using it.