

Activating and Using your SmartVault Guest Account

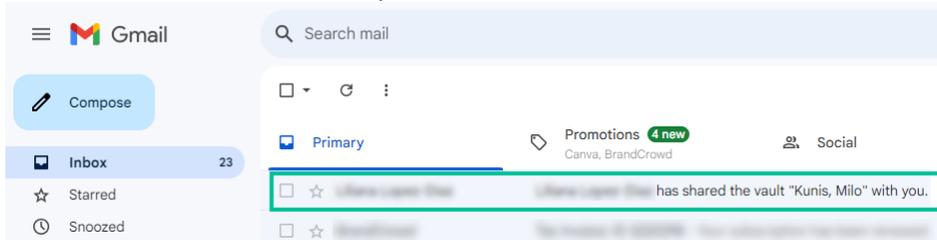
GUEST USER

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".



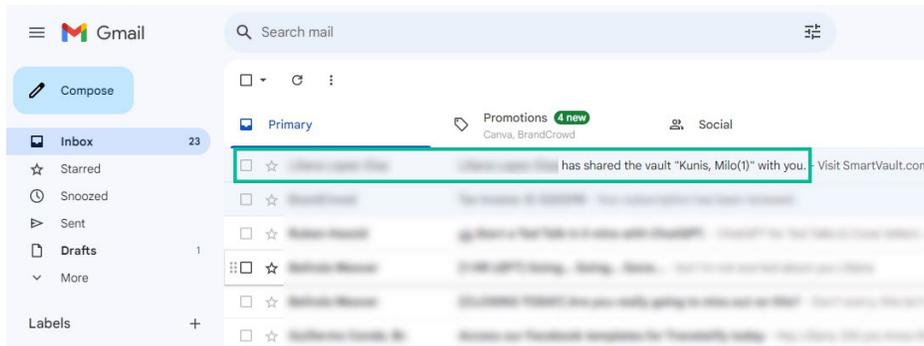
→ Note

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.

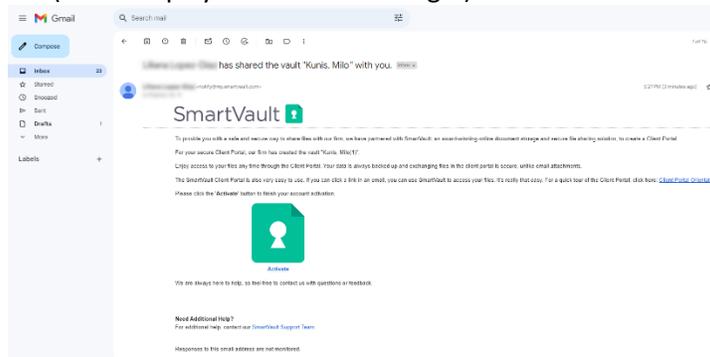
Activating your Guest Account

Once you have received the activation email from SmartVault:

1. Open the activation email.



2. Click the **Activate** button. (It will display the SmartVault logo.)



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.



SmartVault

Access your documents

The Vault has been shared with you by . Please complete the form below to create your user and access your documents.

First name
Lili

Last name
Diaz

Email
lili.diaz@smartvault.com

Phone number
123-456-7890

Enter a password

Confirm Password

Strength Optimal
Minimum length is 12 characters; must include at least one of each of the following; uppercase letter, lowercase letter, number, punctuation.

I agree to SmartVault's [Terms of Service](#)

[Create My User](#)

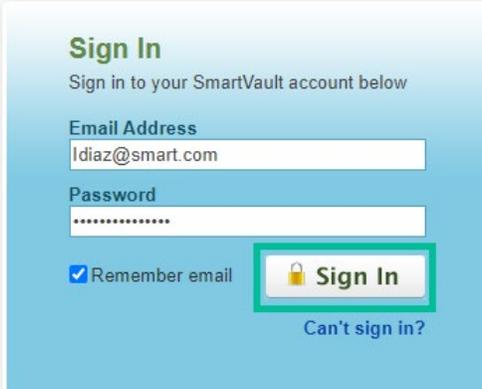
Signing In to your SmartVault Guest Account

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

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

→ **Note**

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



Sign In

Sign in to your SmartVault account below

Email Address
ldiaz@smart.com

Password

Remember email

[Sign In](#)

[Can't sign in?](#)

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