

Uploading Files as a Guest User

GUEST USER

As a Guest User on SmartVault, quickly and easily upload documents through the **Upload Documents** option on the left-hand navigation bar or via the Secure Document Upload box on the main panel. Your account manager (who invited you to create your guest account) can view and download any files you upload.

Important Considerations Before You Start

- Please ensure you have an active SmartVault Guest Account and are logged in to the SmartVault Portal to upload documents.
- **Unsupported File Types:** Before uploading, be aware of the [unsupported file extensions](#). Attempting to upload files with these extensions will result in an error.
- **Deleting Uploaded Files:** Remember, if you accidentally upload a file and don't have the necessary permissions to delete it, please contact your account manager for assistance. They can help you remove the file from your SmartVault account.
- **Creating Folders:** As a Guest User, you cannot create new folders within SmartVault. If you need a new folder to upload your files, please contact your account manager for assistance.

Uploading your Files

Note

Depending on the SmartVault account plan your account manager uses, the upload process may vary slightly.

To upload a file:

1. **Accessing SmartVault:**
 - a. [Sign in to the SmartVault Portal](#).
 - b. Enter the email address and password you used to activate your guest account.
 - c. Click **Sign In**.

A screenshot of the SmartVault Sign In page. The page has a light blue background. At the top, it says "Sign In" in green. Below that, it says "Sign in to your SmartVault account below". There are two input fields: "Email Address" with the text "ldiaz@smart.com" and "Password" with a masked password "*****". Below the password field is a checkbox labeled "Remember email" which is checked. To the right of the checkbox is a "Sign In" button with a lock icon. Below the button is a link that says "Can't sign in?".

Note

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

2. **Accessing Upload Documents:**
 - a. Choose either **Upload Documents** from the left-hand navigation bar or click **Upload a Document** from the Home page.

To upload a file:

Important

- Your account manager chooses the folders you can access on the **Upload Documents** page. You will see only the folders where you can upload files.
- If you don't see the folder you need to upload your files, please contact your account manager for assistance.

1. Select **Upload file** next to the folder where you would like to upload your file.
2. In the **Upload file here**, drag and drop your file inside the drag-and-drop area.
 - To upload a file from your computer, click inside the drag and drop area, select the file(s) you want to upload, then click **Open**.
3. Add more files as needed and click **Save** to finalize.
4. A confirmation message appears. A green check mark shows you the uploaded files.
5. Close the confirmation message.

Here's an animated guide illustrating the steps visually. If it appears too small, simply click the **Expand** icon  in the bottom right corner to enlarge it.

