

Viewing Your Files as a SmartVault Guest User

GUEST USER

As a Guest User, you can view and manage specific folders and files your account administrator (who invited you to create your account) has shared with you. Let's dive into how you can quickly access and manage your files.

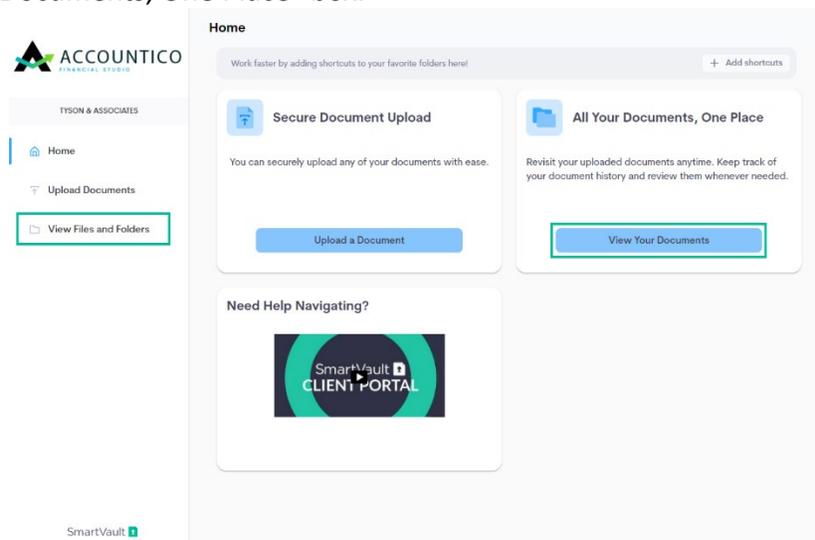
Caution: Deleting Files

if you accidentally upload a file and don't have the necessary permissions to delete it, please contact your account administrator for assistance. They can help you remove the file from your SmartVault account.

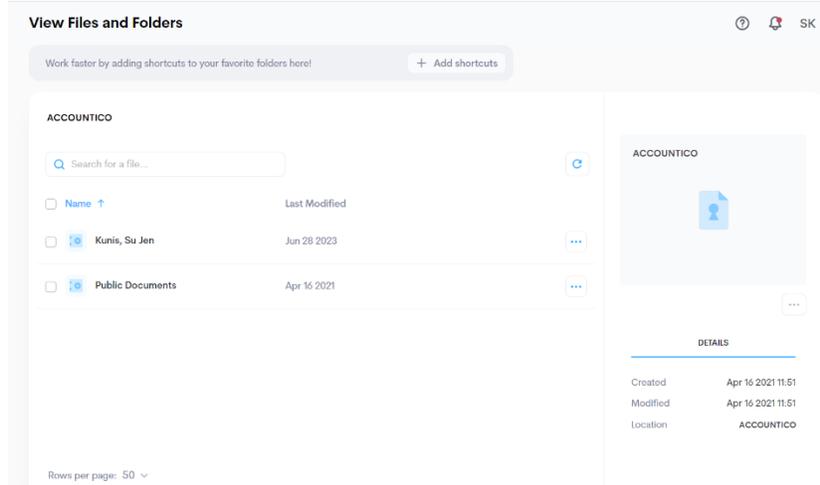
Accessing Your Files

To access your files:

1. [Sign in to the SmartVault Portal](#).
2. Select **View Files and Folders** on the left-hand navigation bar or click the **View Your Documents** button in the "All your Documents, One Place" box.

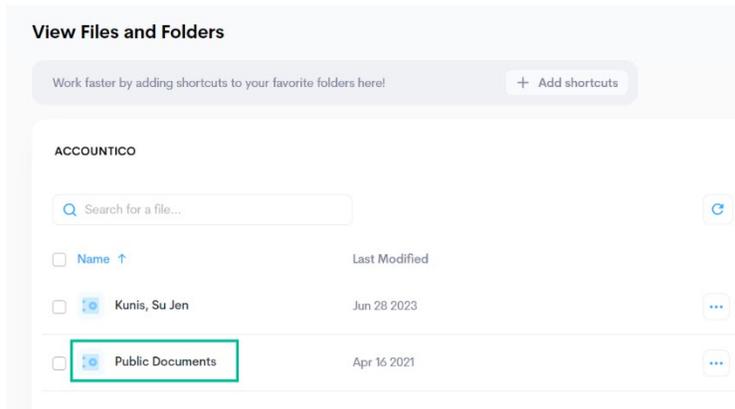


3. You'll see a list of Vaults (these are like storage boxes for your files) you can access.

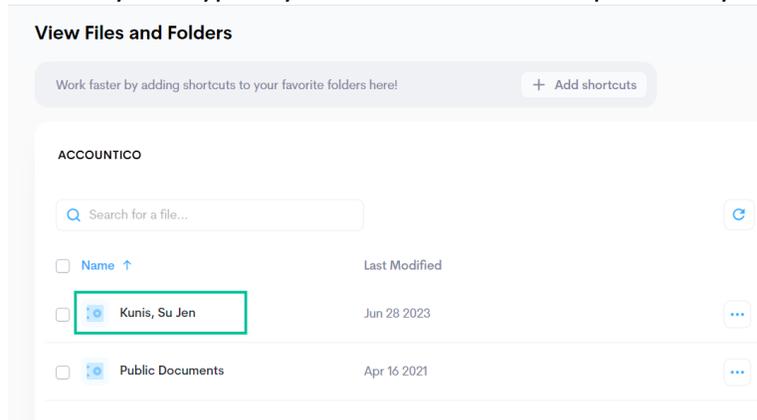


Understanding Your Vaults

- **Public Documents Vault** - This is a general area where the account administrator uploads forms and information that all clients can see.



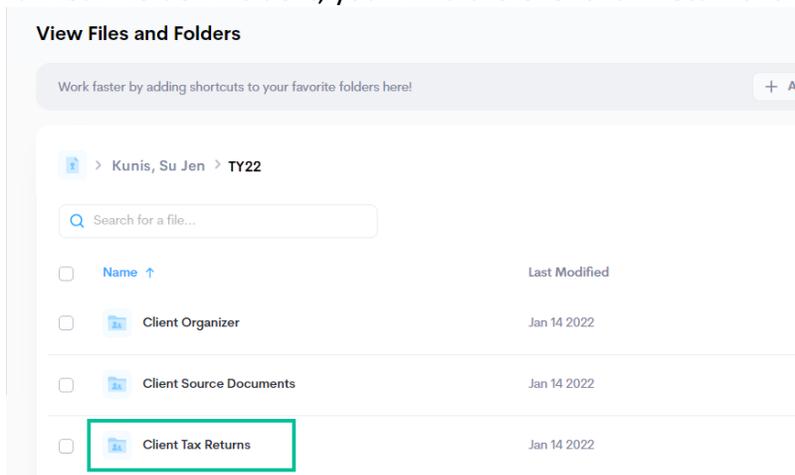
- **Personal or Company Name Vault** - This area, named after you or your company, holds your personal documents. Here is where you'll typically find the files that are specific to you.



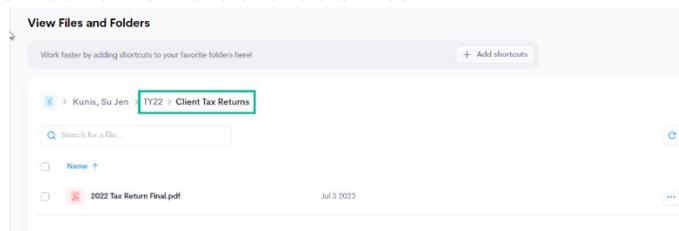
Finding Your Documents

If you're looking for specific files, such as tax returns, here's how to find them:

1. Click on the vault with your name or your company's name.
2. Navigate to the "Tax Year" folder. Inside it, you'll find the **Client Tax Returns** folder.



3. Click the folder to open it and view the available files.



You can also [customize your account with shortcuts](#).

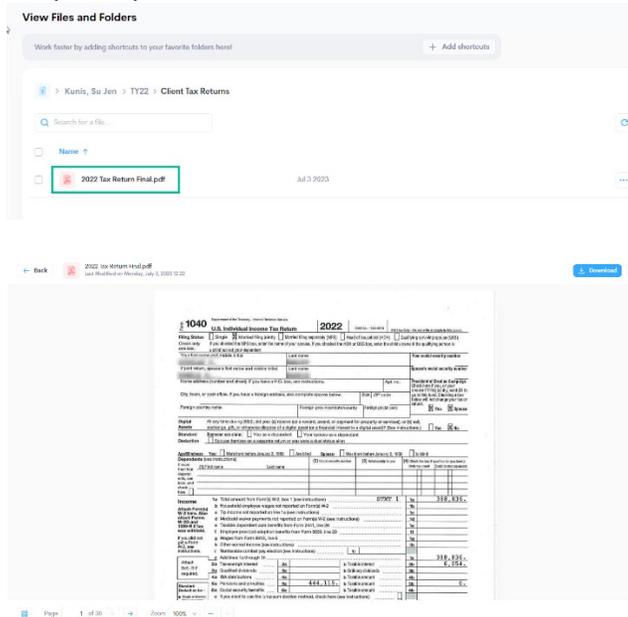
Important

If necessary documents are missing, contact your account administrator.

Previewing, Downloading, and Copying Your Documents

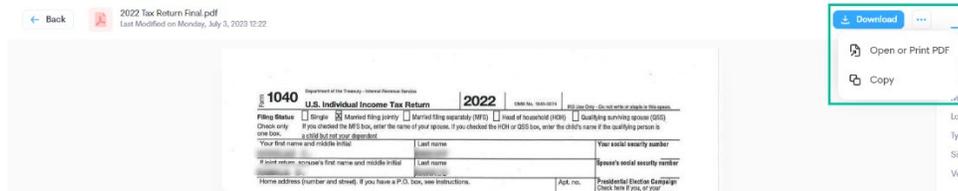
You can preview a document without having to download it first:

1. Navigate to the folder containing the file you want to preview.
2. Click on the document to open a preview.



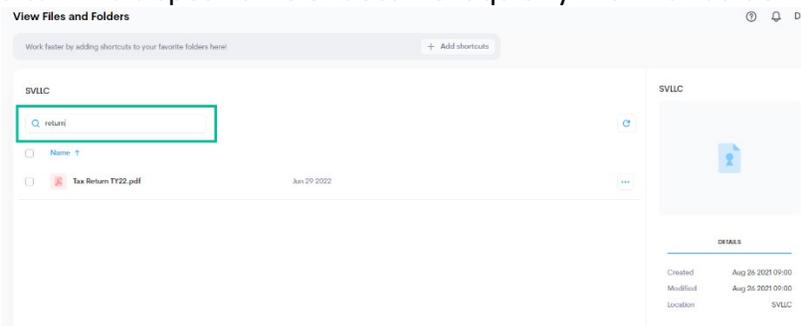
From the preview page, you can manage your documents quickly:

1. Click **Download** to save the file to your device.
2. Click **Actions** and select **Open or Print PDF** to open the file on your PDF reader or to print it.
3. To make a copy of the document in a different folder, select **Copy** from the Actions menu.



Simplifying Your Search and Sort

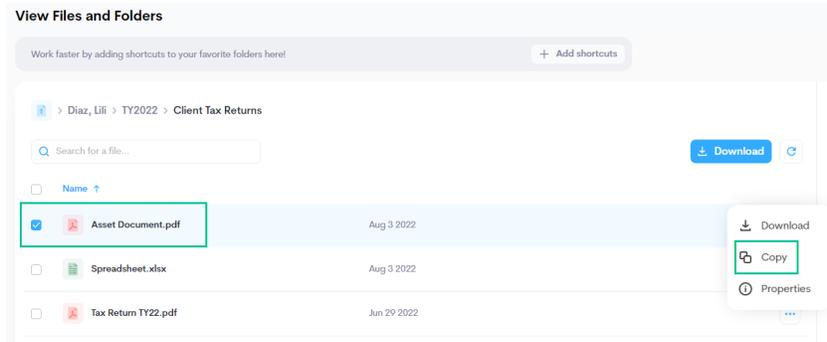
Using the search bar, you can find a specific file or document quickly within a vault or folder.



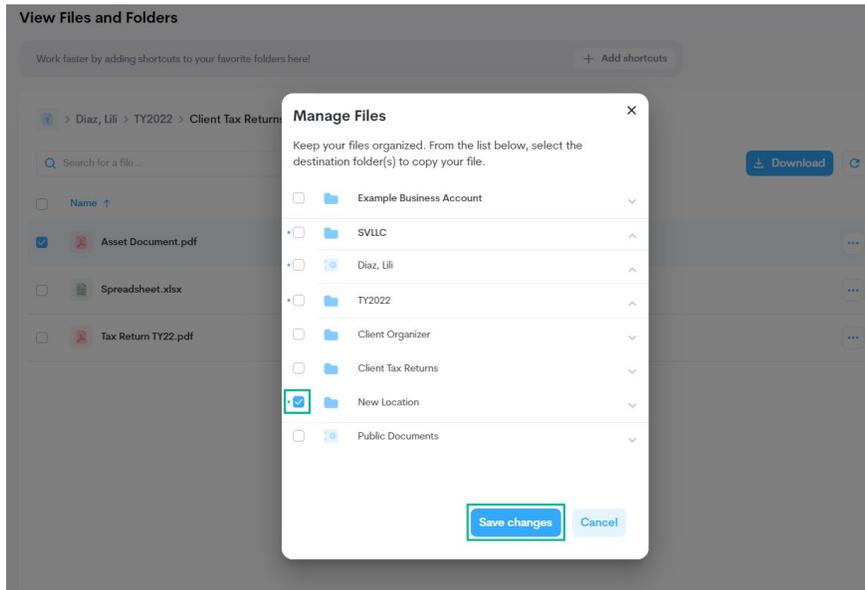
The "View Files and Folders" page automatically displays your files alphabetically. Clicking the column headers (**Name** and **Last Modified**) will sort your files and folders in ascending or descending order.

Creating a Copy of a Document

1. Select the document you want to copy and click **Actions** .
2. Select **Copy** from the Actions menu.



3. In **Manage Files**, select the checkbox for the folder where you want to place the copy and click **Save changes**.



As a guest user, you never alter the original documents; you access copies. So feel free to download, print, or copy what you need! If you need further assistance, don't hesitate to contact our [Support Team](#).