

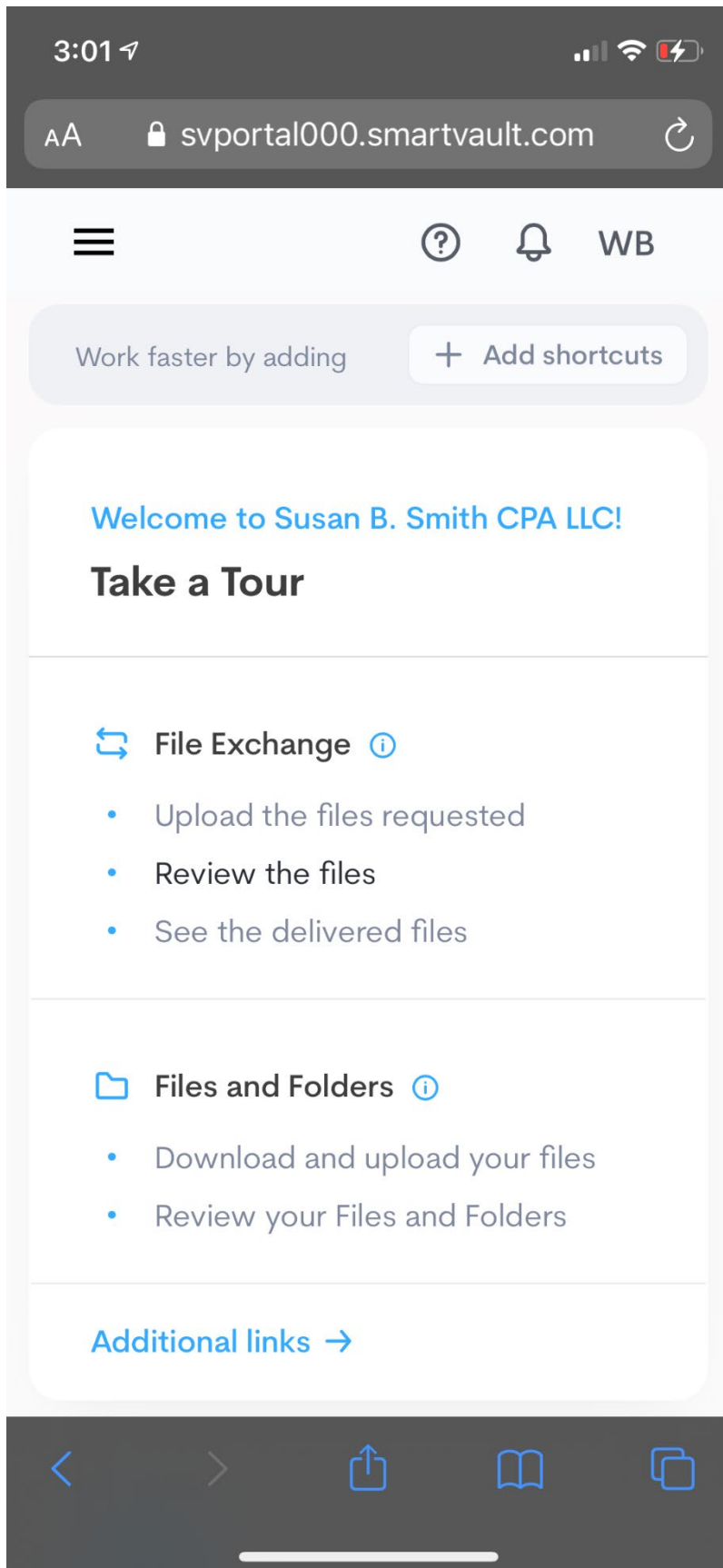
SmartVault

Quick Reference Guide

Uploading to

SmartVault

Mobile



When you navigate to SmartVault on your mobile device, you will find yourself on the home page. Touch the three lines at the top to open the main menu.

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 Home

 File Exchange

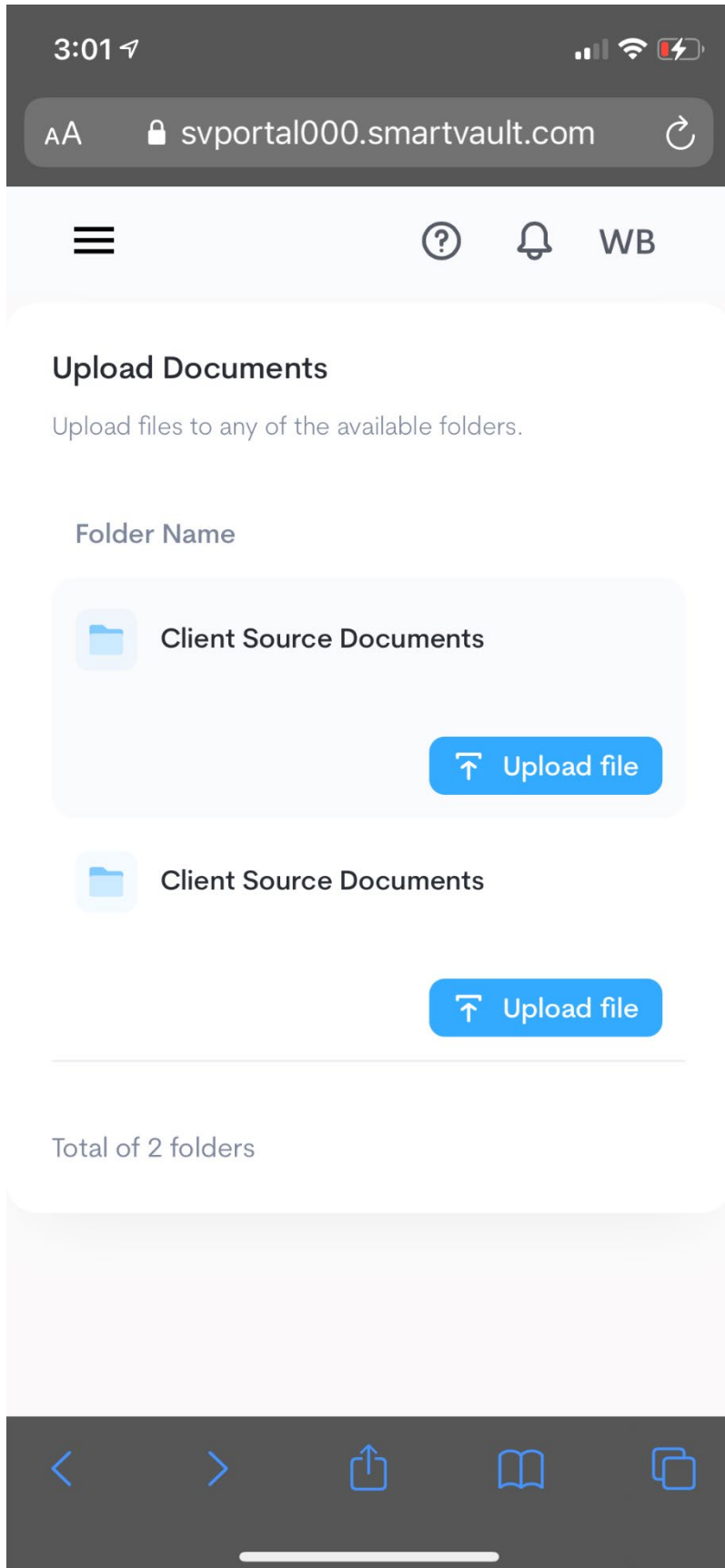
 Files and Folders

SmartVault 

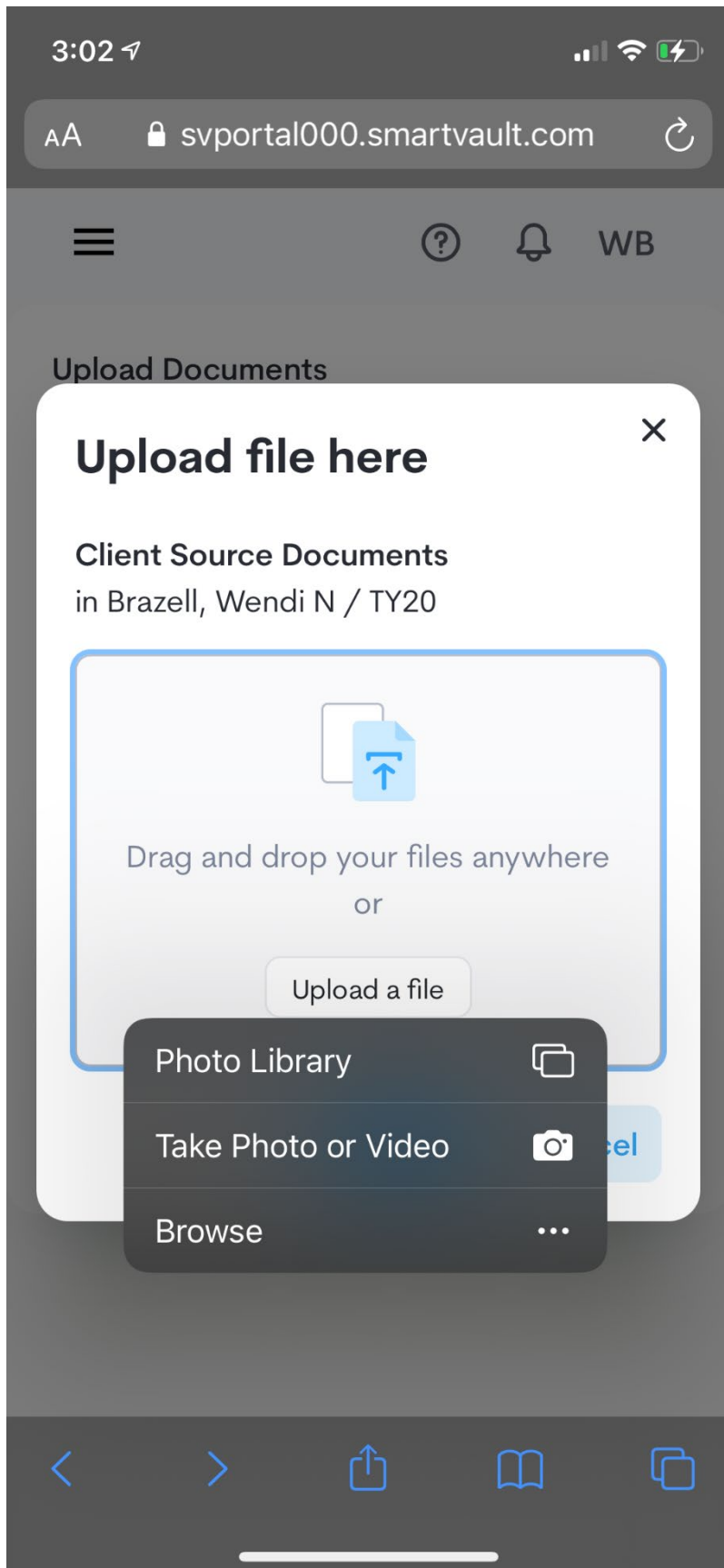
SmartVault for Accountants - Accounting Pro



From the main menu, select File Exchange to upload your documents.



The top Client Source Documents file is for your most current tax year. Select upload files to attach the photographs or PDFs from your scan app to your SmartVault.



From here, select Upload a file and choose where on your mobile device your file is saved and then click Save File to add it to your documents.