

# SETTING UP YOUR SMARTVAULT

## Step by step guide to create your SmartVault account

**Step 1.** Go to the email sent to you inviting you to set up and account. Click on the 'Active' button and follow the link and fill in your details to set up your account including phone number and password.

**Step 2.** Sign into your account

BOOKKEEPING 4U 

Hello Clients

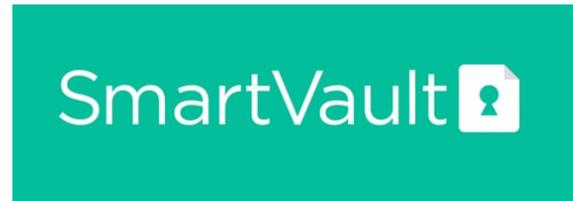
As mentioned in the email earlier today, to provide you with a safe and secure way to share files with our firm, we have partnered with SmartVault, an award-winning online document storage and secure file sharing solution, to create a Client Portal.

For your secure Client Portal, our firm has created the vault "Bright Blue Training".

Enjoy access to your files any time through the Client Portal. Your data is always backed up and exchanging files in the client portal is secure, unlike email attachments.

The SmartVault Client Portal is also very easy to use. If you can click a link in an email, you can use SmartVault to access your files. It's really that easy. For a quick tour of the Client Portal, click here: [Client Portal Orientation](#)

Please click the 'Activate' button to finish your account activation.



**Step 3.** You should see the screen below. Click on 'Files and Folders'



#xeros4heroes

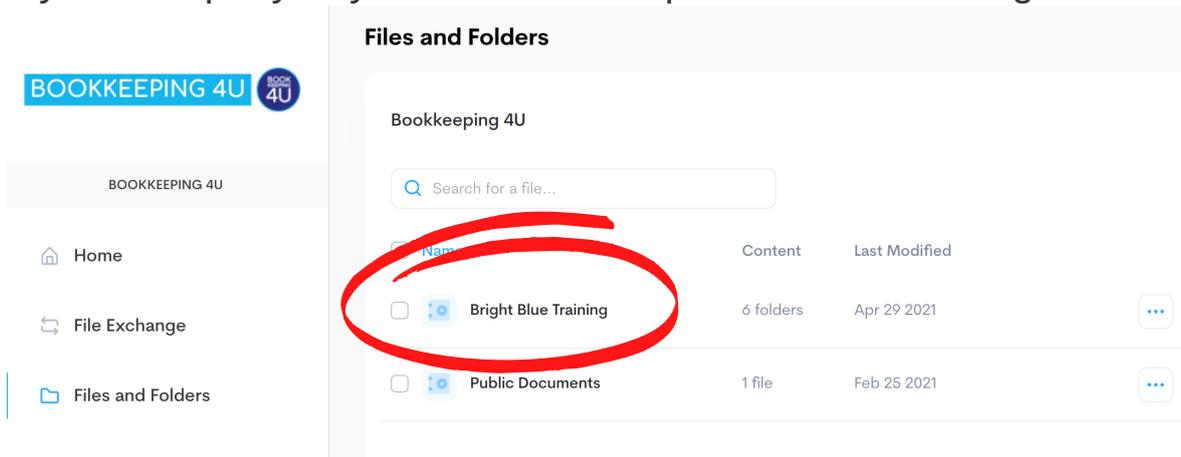


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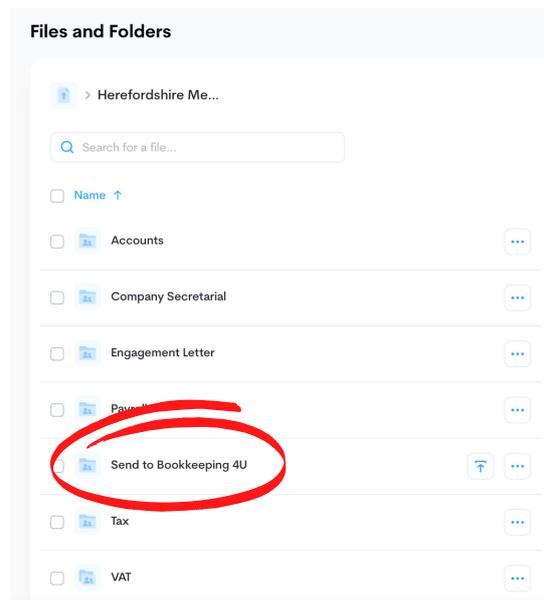
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**Step 4.** You should then see two folders in the centre of the screen. Click on your company or your name. Example shown is for 'Bright Blue Training'



**Step 5.** You should see a list of folders. These are relevant to the services that you have from Bookkeeping 4U. (if you have payroll, you will have payroll folders, if you have VAT, you will have VAT folders etc) Click on 'Send to Bookkeeping 4U' and add the documents or files you wish to send to us. They will automatically appear on our SmartVault.



**Step 6.** You can just email or text to let us know you have uploaded into SmartVault.



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E: [mail@bookkeeping4u.biz](mailto:mail@bookkeeping4u.biz)  
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