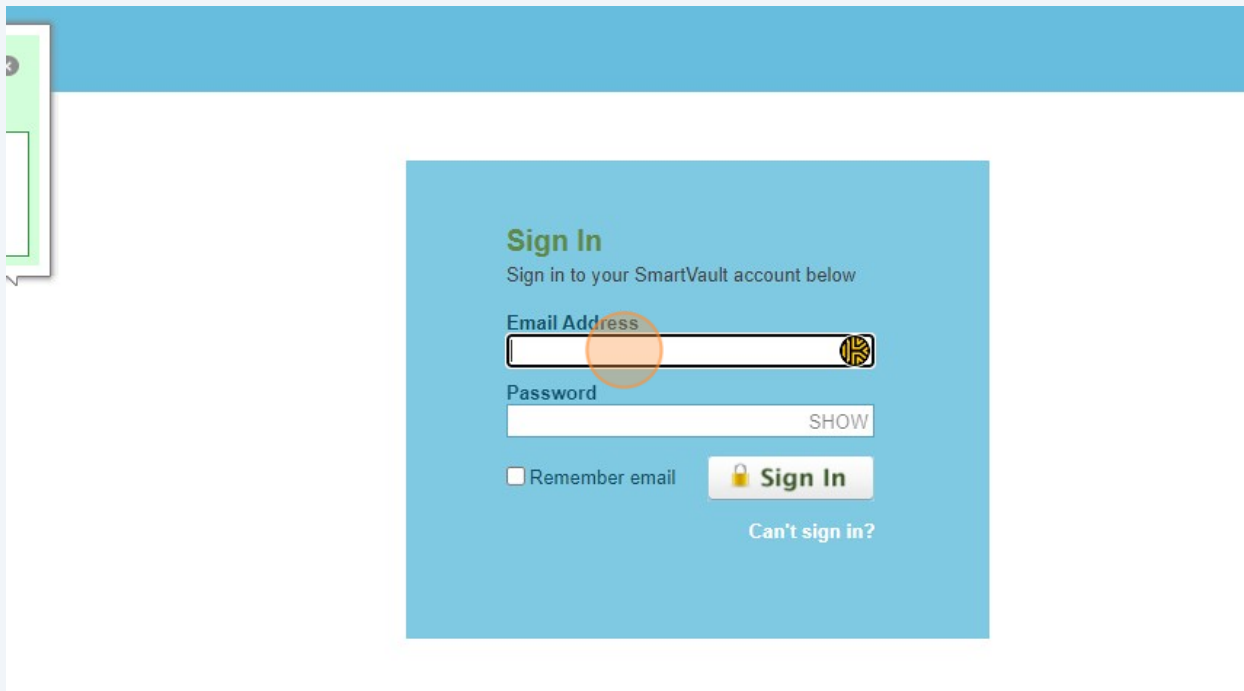


How to Update SmartVault Notifications

To be able to receive Notifications as quickly as possible when Your Tax Return Is Ready, set your SmartVault notifications to every 15mins.

1 Navigate to [SmartVault](#).

2 Sign-in using your email address and password.



The screenshot shows the SmartVault sign-in interface. It features a blue header bar at the top. Below the header, there is a white sidebar on the left. The main content area is white and contains a blue sign-in box. The sign-in box has the following elements: the title "Sign In" in green, the instruction "Sign in to your SmartVault account below", an "Email Address" label above a text input field with a cursor, a "Password" label above a text input field with a "SHOW" button to its right, a "Remember email" checkbox, a "Sign In" button with a lock icon, and a "Can't sign in?" link at the bottom.

3 Enter the code sent to your email address.

We've sent a verification code to your email address:
a*****r@gmail.com
Check your email and enter the code.
The code will expire in 10 minutes.

Verify Identity
Enter code below

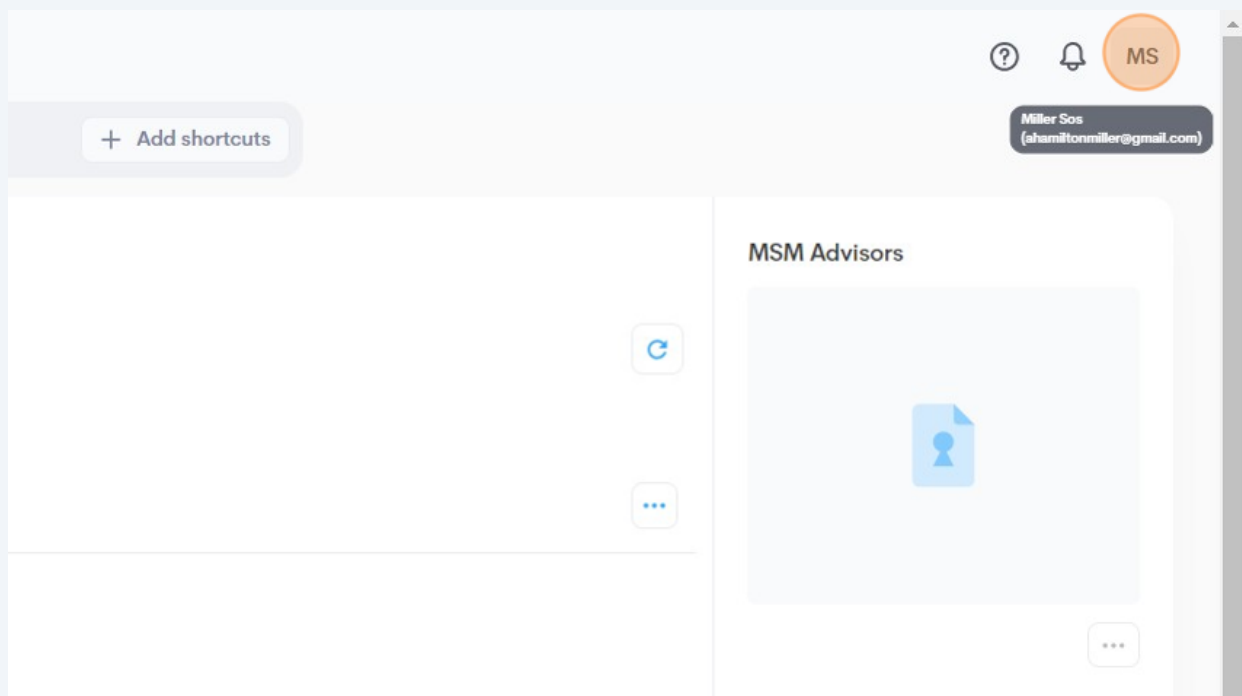
Verification Code

Submit

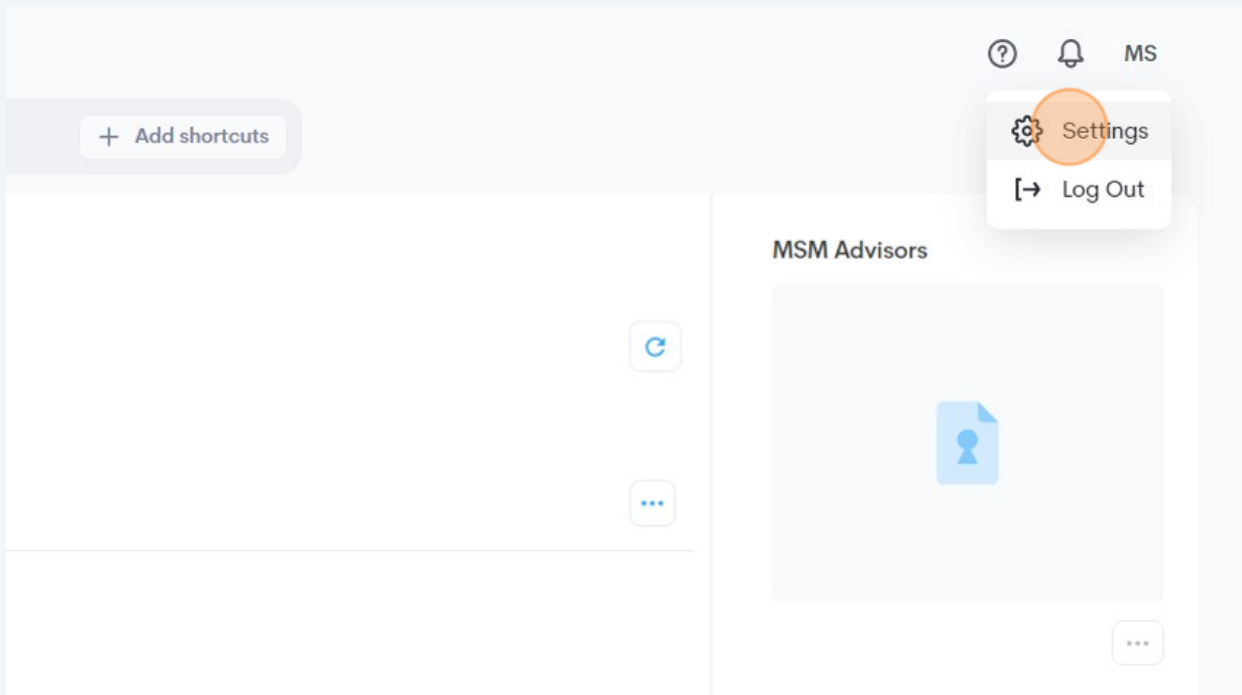
Resend Verification Code

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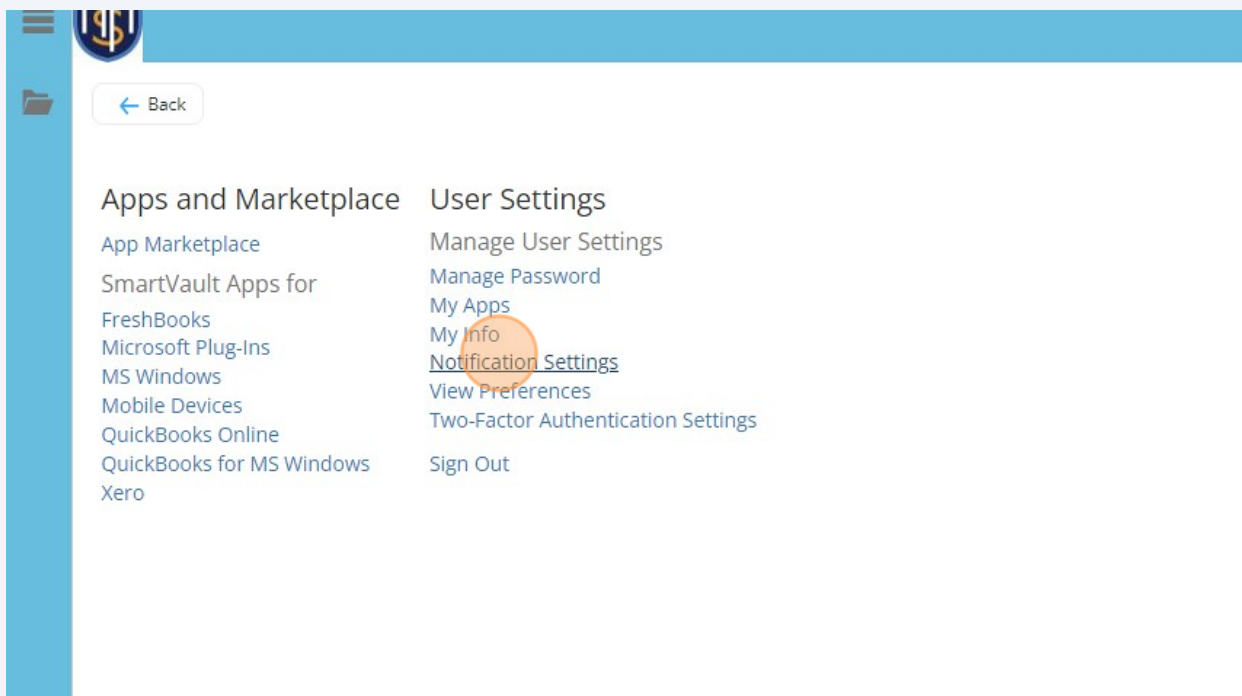
4 Once you are in SmartVault, Click your Initials in the top right-hand corner.



5 Select the gear icon for "Settings" from the menu



6 Click "Notification Settings"



7

Change the UPLOAD Notifications to 15mins. You will only be notified when we upload files for your review.

The screenshot shows the 'Upload Email Notifications' section of the SmartVault settings. It includes a header with a logo and a menu icon. Below the header, there is a section titled 'Upload Email Notifications' with a descriptive paragraph. A dropdown menu is set to 'Once a day (9:00 a.m.)'. Below this is another section titled 'Download Email Notifications' with a descriptive paragraph. A dropdown menu is open, showing options: 'Every 15 Minutes', 'Every Hour', 'Twice a day (9:00 a.m. and 5:00 p.m.)', 'Once a day (9:00 a.m.)', and 'Never'. The 'Once a day (9:00 a.m.)' option is highlighted. A 'Save Changes' button is located at the bottom right of the settings area.

8

(OPTIONAL) Change the download notifications to every 15mins.

The screenshot shows the 'Download Email Notifications' section of the SmartVault settings. It includes a header with a logo and a menu icon. Below the header, there is a section titled 'Download Email Notifications' with a descriptive paragraph. A dropdown menu is set to 'Once a day (9:00 a.m.)'. Below this is another section titled 'Send download notifications:' with a dropdown menu set to 'Every 15 Minutes'. A 'Save Changes' button is located at the bottom right of the settings area. A separate dropdown menu is shown at the bottom of the page, listing the same options as in the previous screenshot: 'Every 15 Minutes', 'Every Hour', 'Twice a day (9:00 a.m. and 5:00 p.m.)', 'Once a day (9:00 a.m.)', and 'Never'. The 'Once a day (9:00 a.m.)' option is highlighted.

9 Be sure to Save Changes

Every 15 Minutes

Download Email Notifications

SmartVault can automatically send you download email notifications when someone downloads a file from a vault or a folder that you have access to. Specify when you would like to receive download email notifications.

Send download notifications:

Every 15 Minutes

Save Changes

10 Dismiss the success message



Success

Dismiss x

Notification settings saved successfully.

Uploads a file into a
download email

Download Email Notifications

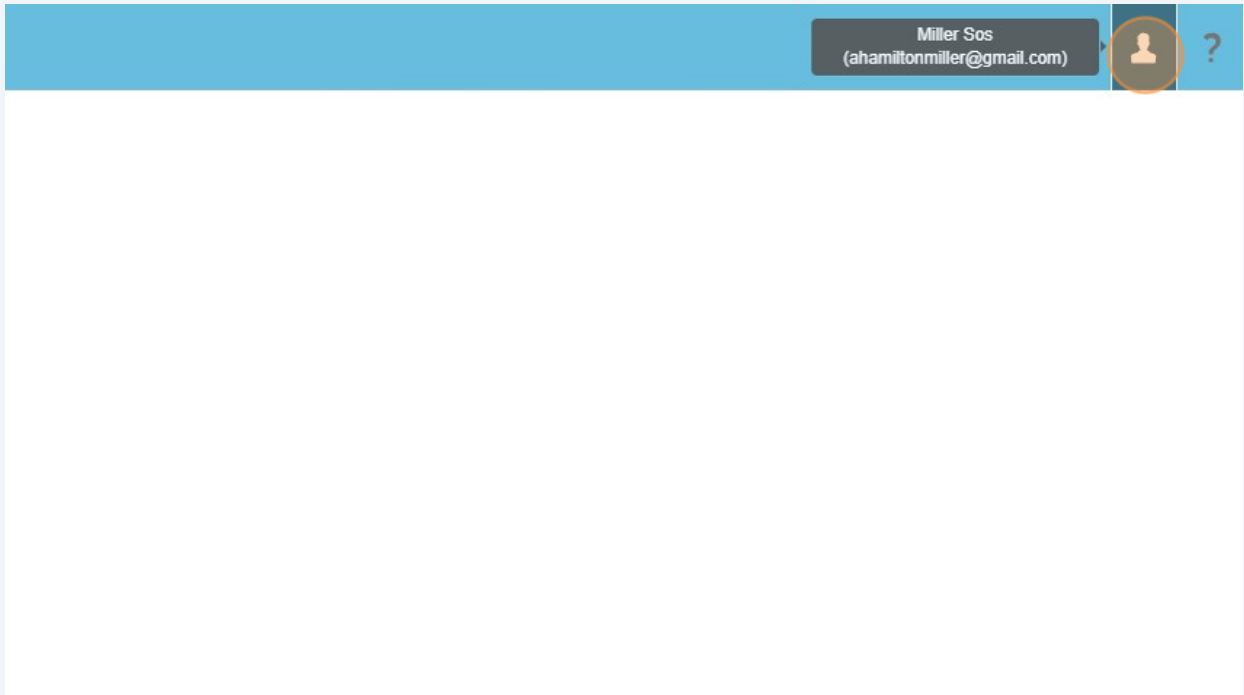
SmartVault can automatically send you download email notifications when someone downloads a file from a vault or a folder that you have access to. Specify when you would like to receive download email notifications.

Send download notifications:

Every 15 Minutes

Save Changes

11 Click the Person icon to sign out



12 Click "Sign Out"

