

Downloading and Locating Your Files as a Guest User

GUEST USER

As a Guest User on SmartVault, you can download any files your service provider shares. Whether it's a tax form, an organizer, a contract, or any other document, you can securely download it directly to your computer. Downloading your files may be necessary when you want to work offline or keep a local copy of your files.

This article guides you through downloading files and locating them on your device.

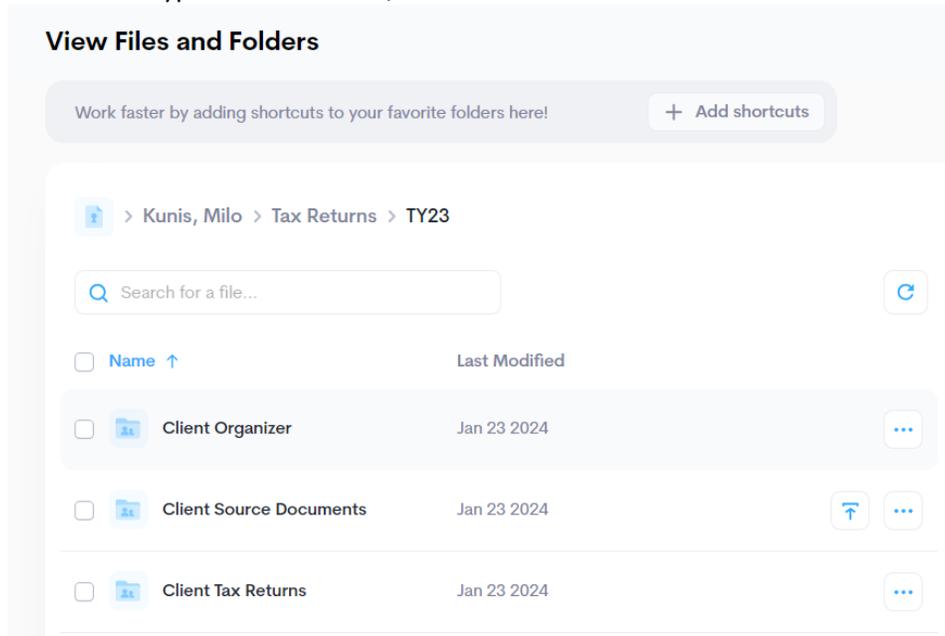
Important

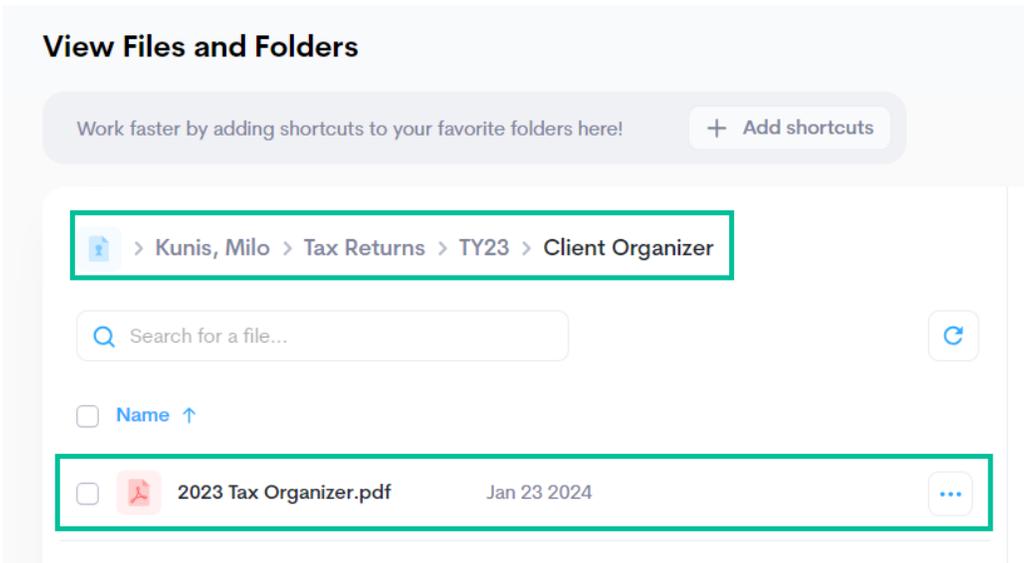
Please ensure you have an active SmartVault Guest Account and are logged in to the SmartVault Portal to download files.

Downloading your Files

To download a file:

1. [Sign in to the SmartVault Portal.](#)
 - Enter the email and password you used to activate your guest account and click Sign In.
 - If you have forgotten your password, click Can't sign in? and follow the instructions to reset your password.
2. Navigate to Your Files:
 - 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.
 - Click the folder with your name or company name (referred to as a "Vault"). Here is where files shared with you are stored.
 - Navigate to the specific folder containing the file(s) you want to download. For instance, if you're looking to download a tax organizer, you would go to Tax Returns > TYXX > Client Organizer. The same approach applies to other types of documents, such as tax returns and contracts.

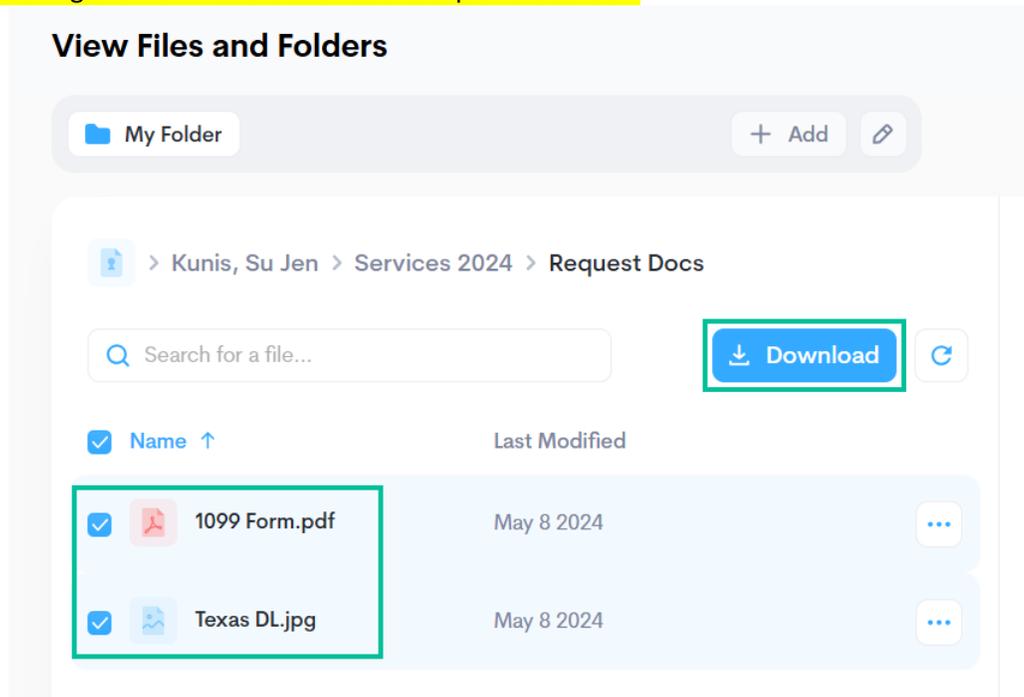




Important Note

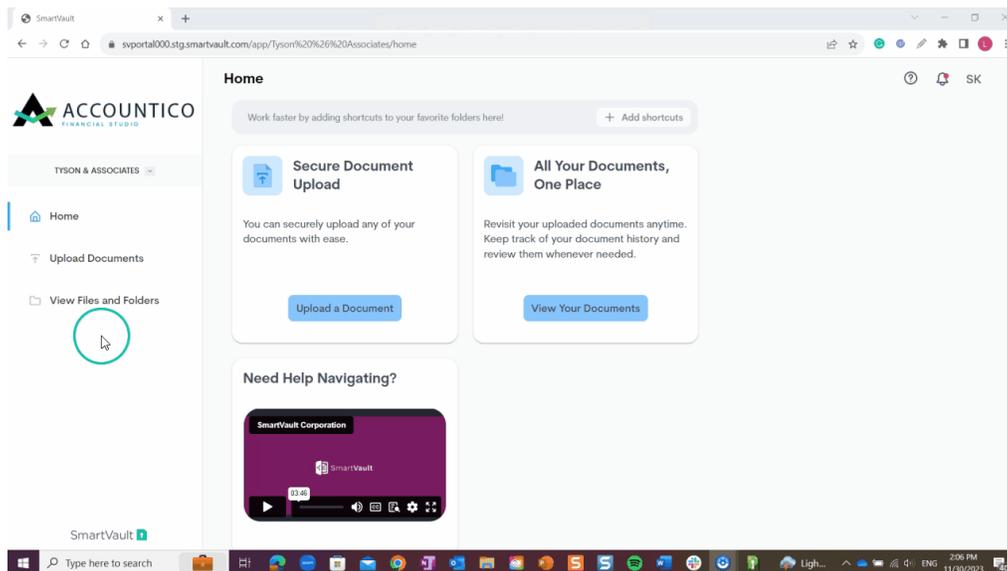
Guest users cannot download entire folders. However, you can download all the files within a folder by:

- Opening the folder
- Selecting the files you want to download
- Clicking the **Download** button at the top of the screen.



3. Download the File:

- Click Actions on the file you wish to download and select Download.
- The downloaded file should appear in the browser's Downloads Bar at the bottom of your screen. Click the file to open it.
- 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.

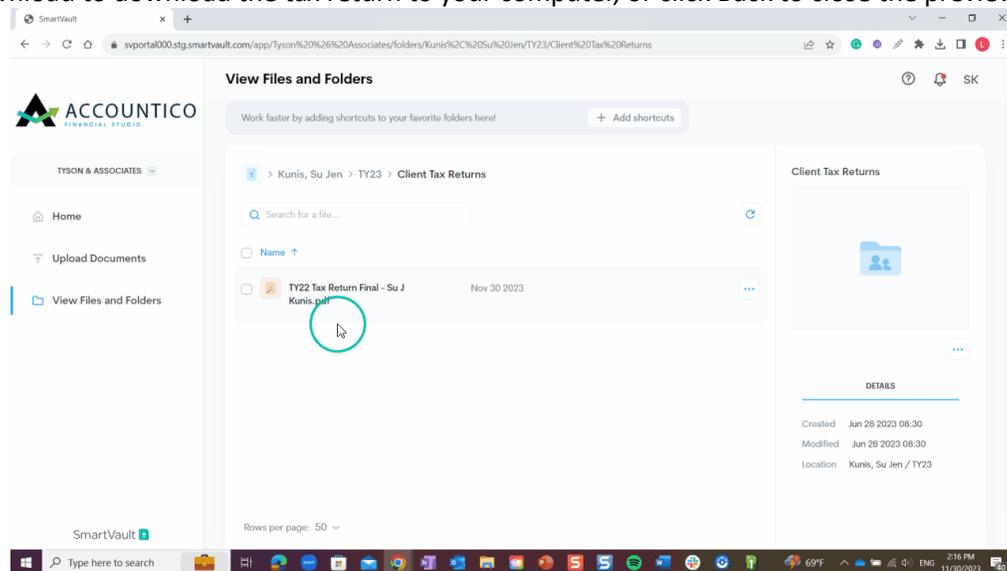


If the downloaded file doesn't appear on the browser's Downloads Bar, you can find it by following [these steps](#).

Previewing and Downloading a File

To preview the file before downloading:

1. Click the document to open a preview.
2. Click Download to download the tax return to your computer, or click Back to close the preview page.



Locating your Downloaded Files

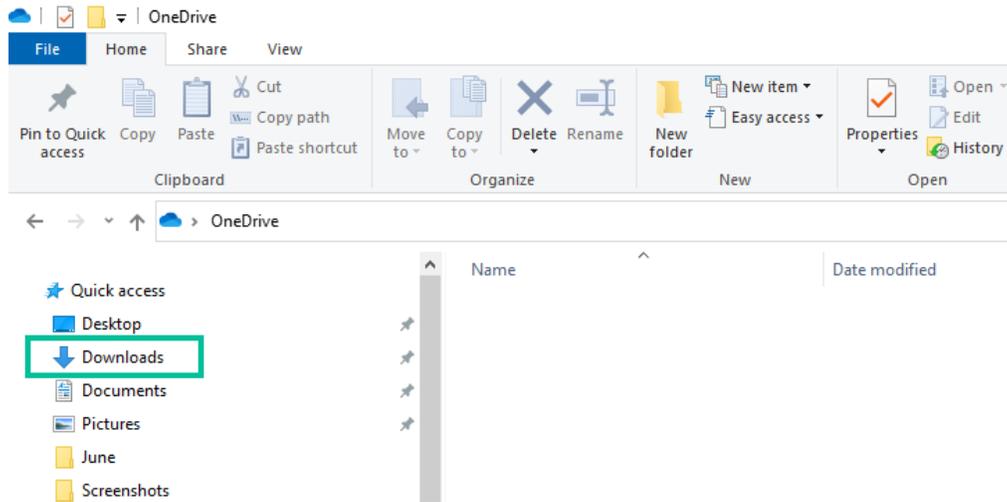
After downloading, you may wonder where to find the file on your computer. By default, most web browsers like Google Chrome, Firefox, and Microsoft Edge store downloaded files in a preset "Downloads" folder unless you've changed the default settings.

To find your downloaded file:

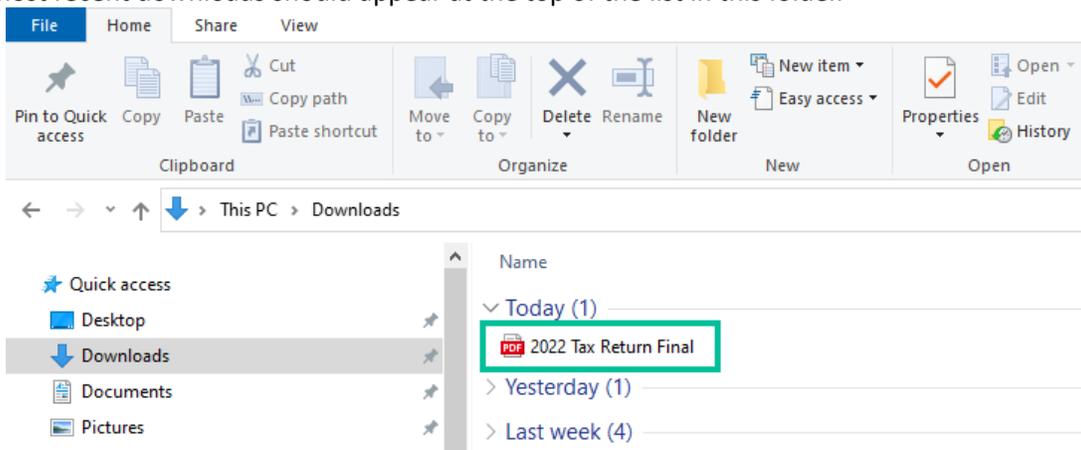
1. Open your computer's "File Explorer." You can find it on your taskbar—typically represented by a yellow folder icon—or by searching for "File Explorer" in your start menu.



2. You should see a folder labeled **Downloads** on the left-hand side. Click on it.



3. Your most recent downloads should appear at the top of the list in this folder.



Remember, if you need further assistance or have other questions, please visit our [Help Center](#) or contact our [Support Team](#).