



LAWRENCE BLAU
& Associates, LLC
Taxes • Financial Services



CLIENT PORTAL TUTORIAL

in partnership with

SmartVault 

When you click the “Activation Link” in the email, the below screen will pop up. Your First name, Last name, and email address will be pre-populated. Add your phone number, chose a password and click “Create My User” – this will take you directly to your portal



The vault La Fleur, Oscar and Lindsay has been shared with you.

Please complete the form below to access it.

Time Zone:

First name:

Last name:

Email address:

Phone number:

Password:

Minimum length is 12 characters; must include at least one of each of the following: upper case letter, lower case letter, number, punctuation

Password Strength:

Confirm password:

I agree to SmartVault's [Terms of Service](#)

1. Make sure you are on the Home screen – click here

Home

My Info

Help

Sign Out

Your name and email

Hide Sidebar

Account Tasks

[Refresh](#)

Help Resources

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[FreshBooks](#)

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Contents for Account Lawrence Blau & Associates LLC

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Item 1 to 2 of 2

Name ▲

Actions



Your name



Public Documents









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Item 1 to 2 of 2

2. Click the folder with your name

Contents for Vault Berman, Rebecca

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Name	Size	Type	Date Modified	Actions
Scanned Documents		Folder	11/16/2017	 
TY16		Folder	11/16/2017	 
TY17		Folder	11/16/2017	 

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My Notification Settings for Vault Your name

Email me when a new file is uploaded to the folder.

Email me when a file in the folder is viewed or downloaded.

3. Click the folder named TY17 to access your Tax Organizer







FOLDER TASKS

- [Refresh](#)
- [Send Link to Folder](#)
- [Get Link to Folder](#)
- [Copy Folder](#)

SmartVault Apps for

- [FreshBooks](#)
- [Microsoft Outlook](#)
- [Microsoft Windows](#)
- [Mobile](#)
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- [QuickBooks for Microsoft Windows](#)
- [Xero](#)

Contents for Folder TY17

Name	Size	Type	Date Modified	Actions
Client Source Documents		Folder	11/16/2017	 
Client Tax Returns		Folder	11/16/2017	 
Tax Organizer		Folder	11/16/2017	 



My Notification Settings for Folder TY17

- Email me when a new file is uploaded to the folder.
- Email me when a file in the folder is viewed or downloaded.

Click on this folder. This will bring you to the next screen containing your Tax Organizer pdf.

Contents for Folder Tax Organizer

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Name	Size	Type	Date Modified	Actions
 2017 Individual Client name Organizer.pdf	2,326 KB	pdf	11/16/2017	   

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

My Notification Settings for Folder Tax Organizer

- Email me when a new file is uploaded to the folder.
- Email me when a file in the folder is viewed or downloaded.

Click the download icon.
This will open up a pdf of
the Tax Organizer which you
can print.