

ATO SmartDocs Vault – Quick Start Guide

Accessing the Vault

1. Click the unique personal URL in your email
2. Complete three (3) easy steps

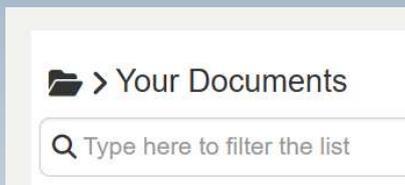
STEP 1  Get Access Code

STEP 2 Enter your Access Code here

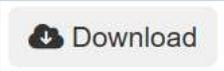
STEP 3  Submit Access Code

Viewing/Downloading Documents

1. Search for the document



2. **Mobile Device:** Click  to view the document or click  to download the document.

Computer: Click  View to view the document or click  Download to download the document.

Digital Signing

1. **Mobile Device:** Click the  button next to a document. If the document requires signing, the  Sign Document and  Reject Document buttons will be visible.

Computer: Click the  View button next to the document with the signature icon ()

2. In the right-hand corner, click  Sign Document or  Reject Document

Uploading Documents

1. **Mobile Device:** Click the  icon at the top of the screen. Click Browse for files to select files from your device to upload

Computer: Click  Upload Documents in the top right-hand side of the screen
Drag and drop files, or use the Browse link to select files to upload

2. Select the staff member/members you would like to notify from the **Send Documents To** box.

3. Click the  button

Further options:

- **Authenticator App** – Switch to using an Authenticator App after first accessing your Vault
- **URL Shortcut** – Create a shortcut to your unique URL on your mobile device