

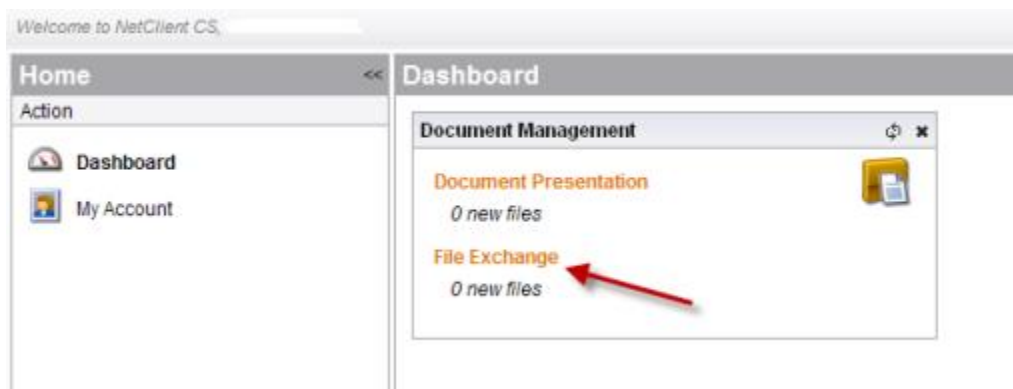
# SMT & Associates

## Web Portal Instructions for FILE EXCHANGE

In order to access your secure portal for purposes of file exchange or access to your tax returns, financial statements or other information, please follow these instructions:

1. Go to our website at [www.smt-associates.com](http://www.smt-associates.com)
2. Click on *Client Login*.
3. Enter the Login name and password provided.

You are now in our secure web portal:



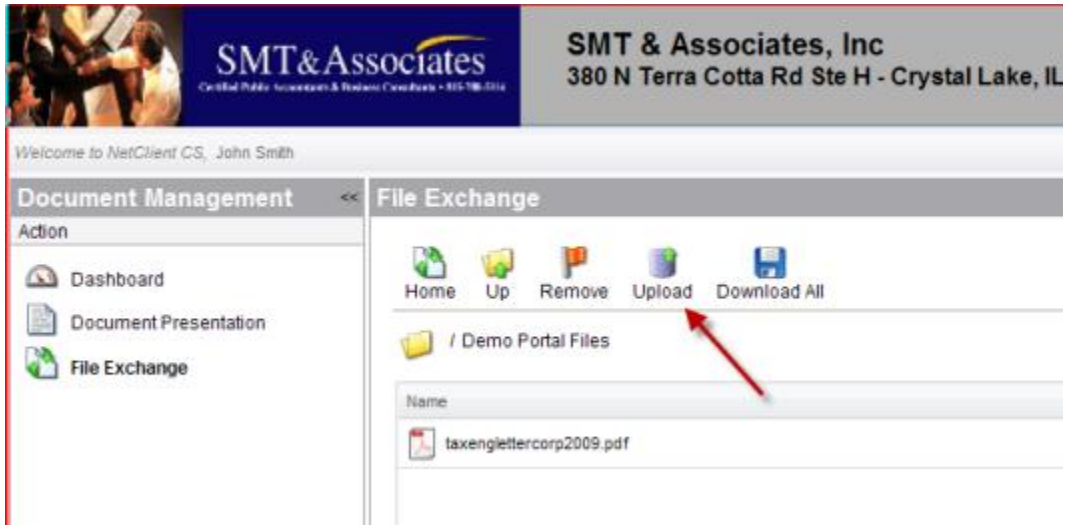
### **FILE EXCHANGE:**

In order to exchange files between our staff, such as QuickBooks files, excel spreadsheets, etc, you can use our secure file exchange.

1. From the main screen above, select File Exchange. this brings you to the file exchange screen below. Click on the folder you wish to upload a file.



2. Click the UPLOAD icon:



3. Click "Select Files"



4. Browse to the location on your computer where your file is located. Select the file to upload and click "Open" to start the upload process.
5. Depending on the speed of your internet connection and size of your file, this process could take a few minutes or more.

6. Once the file is uploaded our staff will be automatically notified of the new file. Likewise, when a new file is uploaded by our staff, you will be notified that a new file is available in your portal via an email.

If we upload a file to your File Exchange folder, you will receive a notification of a new file. When you receive this notification, it will be designated with a red flag. To download this file, simply click on the file. This will open the file or prompt you to save it. We recommend you save it to your local hard drive.

Please note: Files uploaded through the File Exchange folders are stored for a period of 14 days, after which they are deleted from the system.

If you have questions, contact our office at 815-788-5114.