

# Desktop Vault Overview

Personal Financial Website

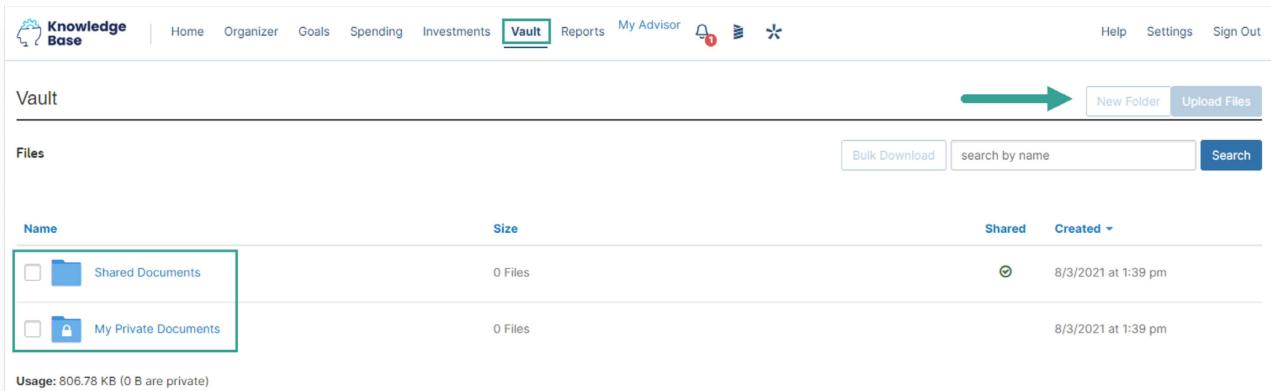
The Vault feature in your Personal Financial Website allows you to store important documents and files safely and securely. This User Guide will show you how to navigate and utilize the Vault, including how to upload files from your computer.

## Note

- You can upload into the **My Private Documents** and **Shared Documents** folders.
- Most file types are supported except for .exe (executable) files.
- The individual file size upload limit is 30MB.

## Navigating the Vault

1. Click the **Vault** tab on the navigation bar. As mentioned above, the two folders you can upload files into are **My Private Documents** and **Shared Documents**. Use **My Private Documents** to store any personal files and use **Shared Documents** when uploading files that you want your Advisor to view and have access to.



Name	Size	Shared	Created
Shared Documents	0 Files		8/3/2021 at 1:39 pm
My Private Documents	0 Files		8/3/2021 at 1:39 pm

Usage: 806.78 KB (0 B are private)

## Note

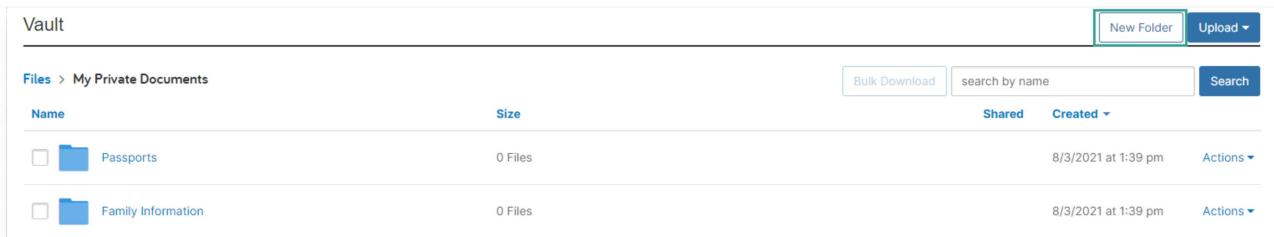
- The New Folder and Upload Files buttons in the top right will remain grayed out until you have clicked into either the **My Private Documents** or **Shared Documents** folder.

# Desktop Vault Overview

Personal Financial Website

- Once you click into either folder, you can use the **New Folder** and the **Upload** buttons at the top right.

Clicking the **New Folder** button allows you to create subfolders for further organization of your files.



Vault

Files > My Private Documents

Name	Size	Shared	Created	Actions
Passports	0 Files		8/3/2021 at 1:39 pm	Actions
Family Information	0 Files		8/3/2021 at 1:39 pm	Actions

New Folder    Upload

- After creating a new subfolder, you will be prompted to enter the folder's name. Click **Create** when finished.

Follow these steps to add as many subfolders as needed.



## Upload Files to the Vault

- To upload files or an entire folder from your computer, first click either the **My Private Documents** or **Shared Documents** folder, then click **Upload** and select **Files** or **Folder**.

If you want to upload to a subfolder you have created, click the subfolder first, then click the **Upload** button.



Vault

Files > My Private Documents > Birth Certificates

New Folder    Upload

Files    Folder

Usage: 806.78 KB (0 B are private)

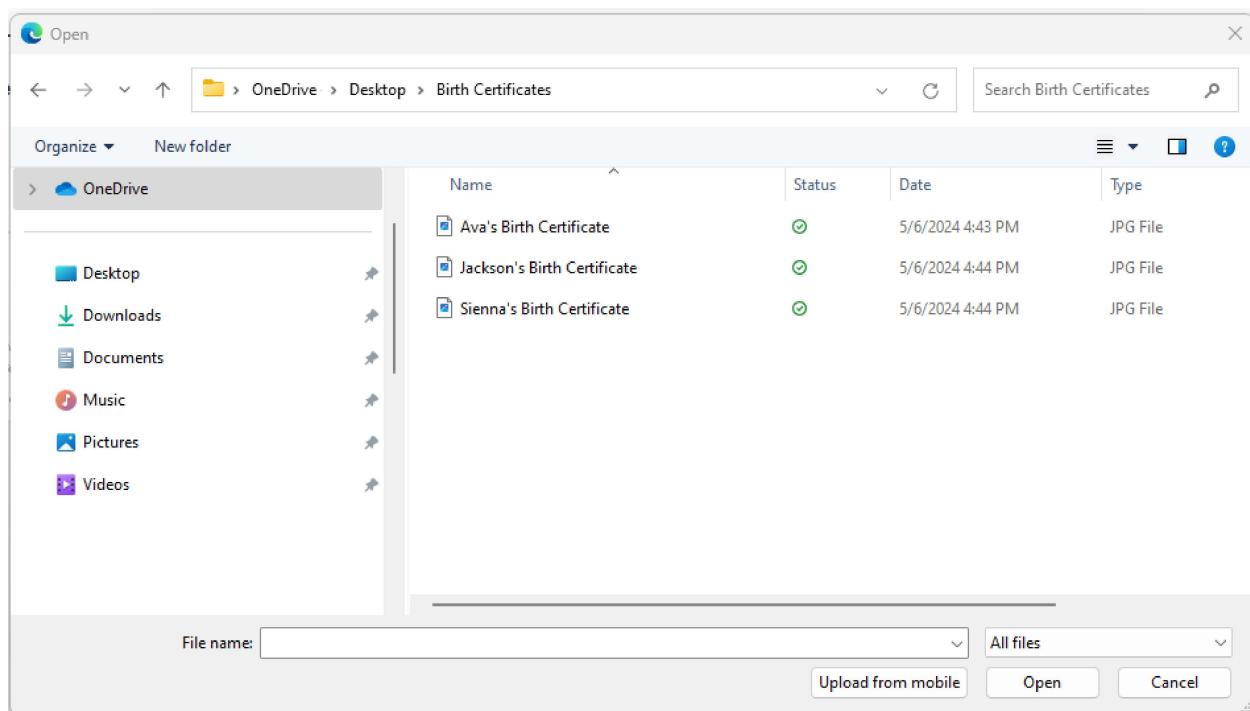
# Desktop Vault Overview

Personal Financial Website

## Note

- Uploading a folder from your desktop will create a subfolder in your Vault containing the files in that folder. Therefore, you may not need to manually create subfolders in your Vault if your desktop files are organized in this way.
- If you uploaded files to the wrong folder, you can always use the **Move** option. This is explained on page 4.

- Your browser will open a new window that allows you to choose files or a folder to upload from your desktop. To select multiple files, hold down the **Shift** key while selecting the files individually. When ready, click **Open** or **Upload**. Depending on your browser, you may need to confirm the upload again.

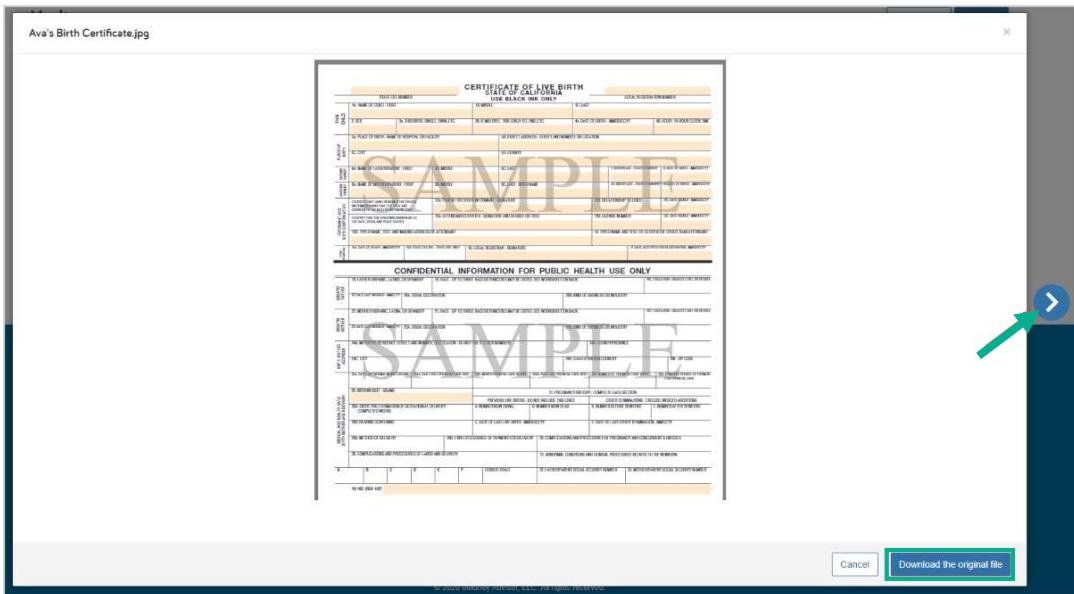


- Once the files are successfully uploaded, you will see a green banner confirming the upload at the top of your Personal Financial Website.

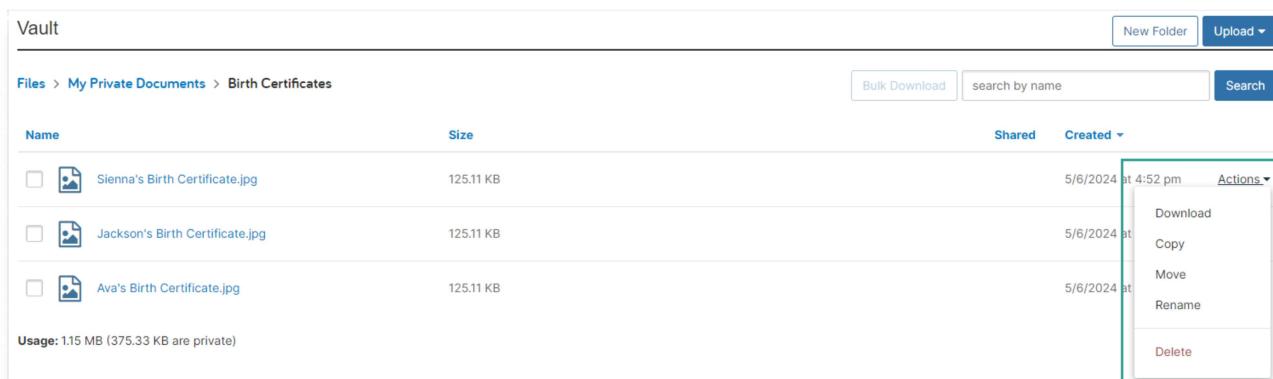


## Vault Actions

1. Clicking on a file in your Vault will bring you into preview mode, where you have the option to Download the original file and easily preview other files within the folder.



2. Each file has an **Actions** drop-down menu giving you the options to **Download**, **Copy**, **Move**, **Rename**, and **Delete** files.



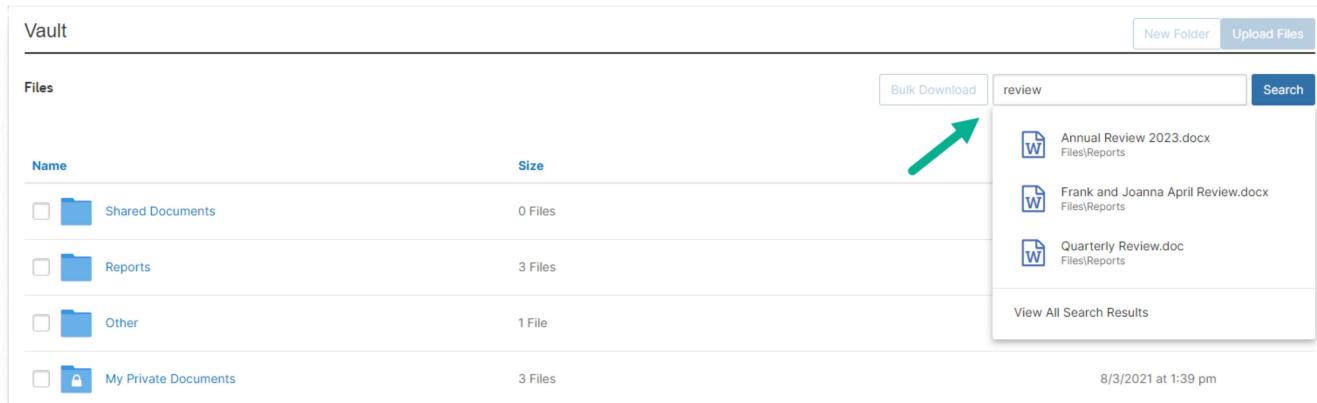
Name	Size	Shared	Created	Actions
Sienna's Birth Certificate.jpg	125.11 KB		5/6/2024 at 4:52 pm	Download
Jackson's Birth Certificate.jpg	125.11 KB		5/6/2024 at 4:52 pm	Copy
Ava's Birth Certificate.jpg	125.11 KB		5/6/2024 at 4:52 pm	Move
				Rename
				Delete

Usage: 1.15 MB (375.33 KB are private)

## Note

- **Download:** This option will download the file to your desktop.
- **Copy:** This option allows you to copy the file and paste it into another folder, without removing it from the original folder.
- **Move:** This option allows you to move the file from this folder to another folder.
- **Rename:** This option allows you to rename the file name in your Vault.
- **Delete:** This option allows you to delete the file. Once deleted, the file cannot be recovered.

3. Finally, remember you can use the **Search** field to quickly filter through all the files in your Vault.



The screenshot shows the 'Vault' interface. At the top, there are buttons for 'New Folder' and 'Upload Files'. Below that is a search bar with the text 'review' and a 'Search' button. A green arrow points to the search bar. The main area is titled 'Files' and contains a table with columns 'Name' and 'Size'. The table rows are:

Name	Size
Shared Documents	0 Files
Reports	3 Files
Other	1 File
My Private Documents	3 Files

On the right side of the table, there is a list of search results:

- Annual Review 2023.docx (Files|Reports)
- Frank and Joanna April Review.docx (Files|Reports)
- Quarterly Review.doc (Files|Reports)

At the bottom right of the table, it says 'View All Search Results' and '8/3/2021 at 1:39 pm'.

# Mobile Vault Upload

Personal Financial Website

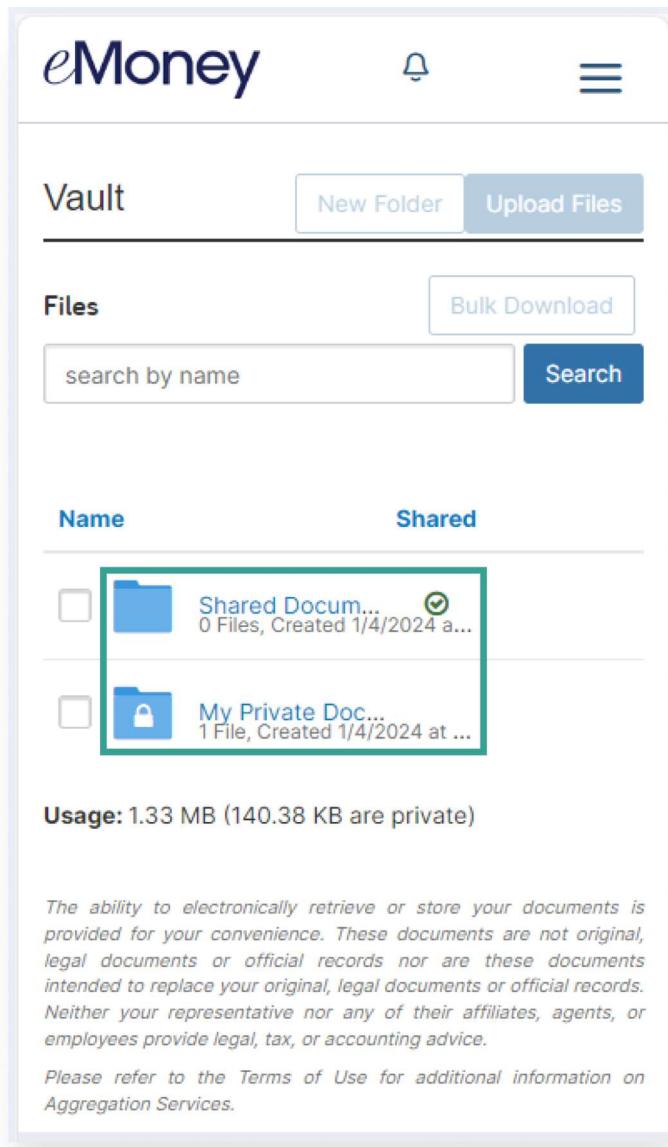
This user guide will demonstrate how to upload files into your Vault from your Mobile Personal Financial Website.

The Vault is where you can access all previously uploaded files and upload new files. Accessing your Vault is simple. Click the 3-line hamburger menu and select **Vault** from the drop-down.

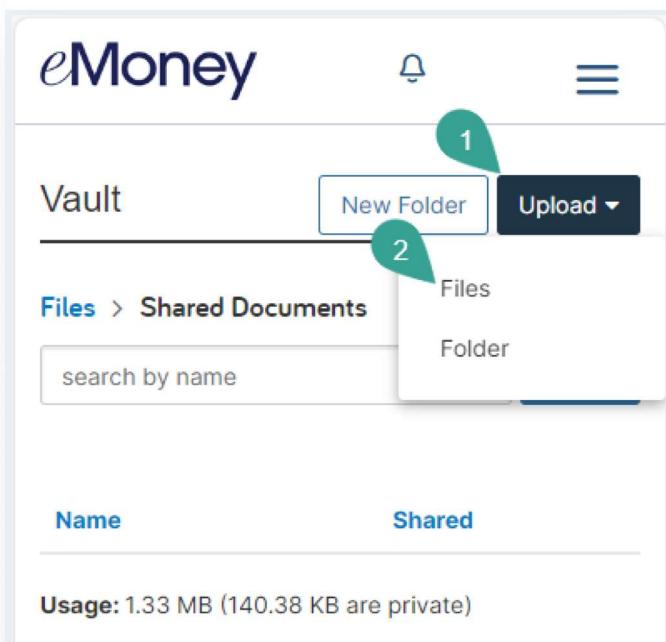
You can upload files into **My Private Documents** and **Shared Documents**. Use My Private Documents for personal items, as the contents of this folder are only viewable by you. The Shared Documents folder is where you should upload any files that will be useful for our team.

## Upload a File

1. To upload a file, click either the **My Private Documents** or **Shared Documents** folder. Click **Upload** and select **Files**. You can also create custom folders by selecting **Folder**.



The eMoney mobile app interface shows the 'Vault' screen. At the top, there are buttons for 'New Folder' and 'Upload Files'. Below that is a search bar with 'Files' and a 'Search' button. The main area shows a table with columns 'Name' and 'Shared'. There are two entries: 'Shared Docum...' and 'My Private Doc...'. The 'Shared Docum...' entry is highlighted with a green box and a callout bubble labeled '1'. The 'Upload Files' button is highlighted with a green box and a callout bubble labeled '2'. At the bottom, it says 'Usage: 1.33 MB (140.38 KB are private)' and includes a disclaimer about the use of documents.

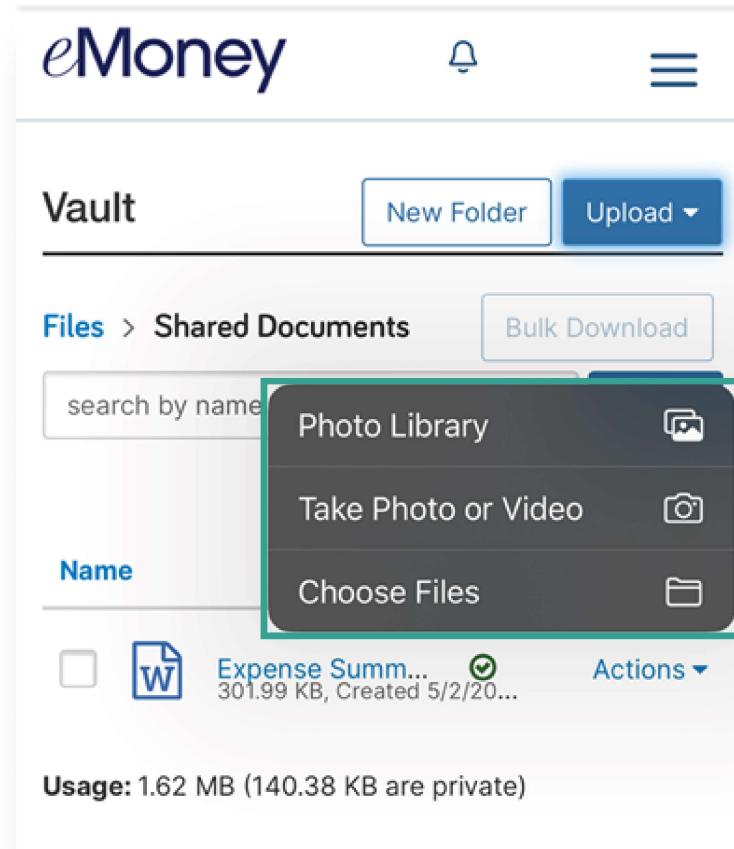


The eMoney mobile app interface shows the 'Shared Documents' screen. At the top, there are buttons for 'New Folder' and 'Upload'. A dropdown menu is open, showing 'Upload' with a sub-menu 'Files' and 'Folder'. The 'Files' option is highlighted with a green box and a callout bubble labeled '2'. The 'Upload' button is highlighted with a green box and a callout bubble labeled '1'. At the bottom, it says 'Usage: 1.33 MB (140.38 KB are private)'.

# Mobile Vault Upload

Personal Financial Website

2. Select Photo Library, Take Photo or Video, or Choose Files on your device.



A message will be displayed showing that the file has been uploaded, and a new file will appear in the list.

## ⓘ Note

- Note that taking a photo with your camera will save the image directly into the Vault and not be stored on your device.
- Most common file types are supported.
- The individual file size limit is 30MB.