



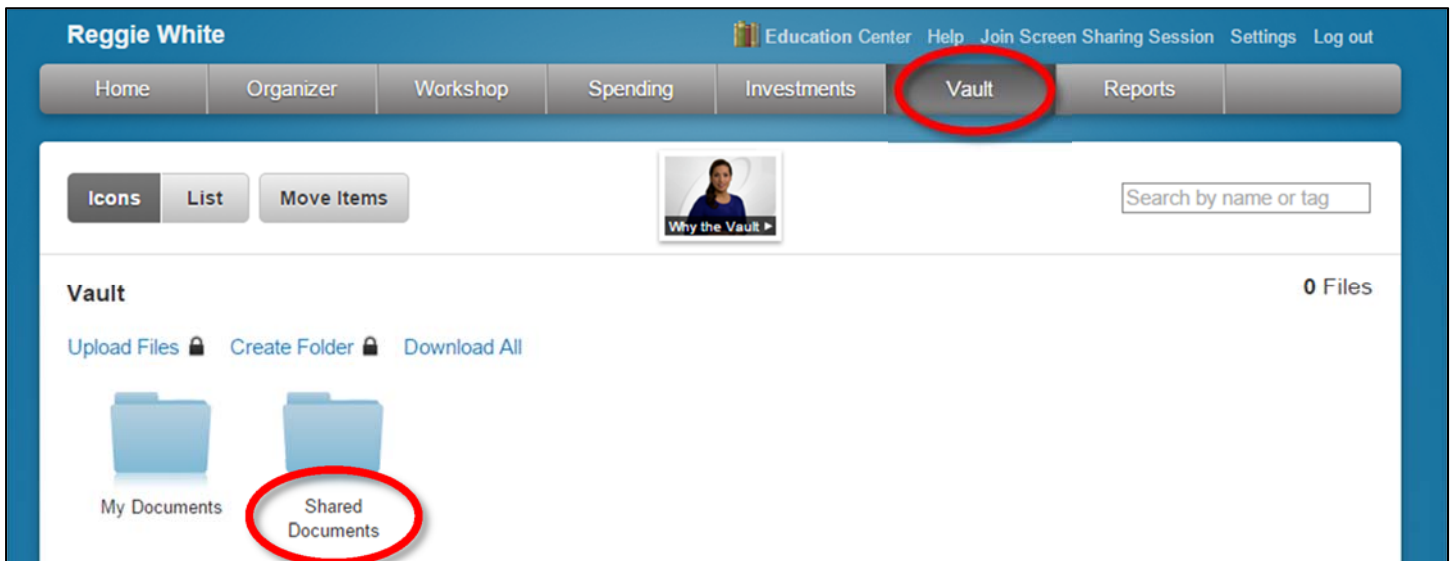
Schaefer Financial  
MANAGEMENT

## Using the Emoney Vault

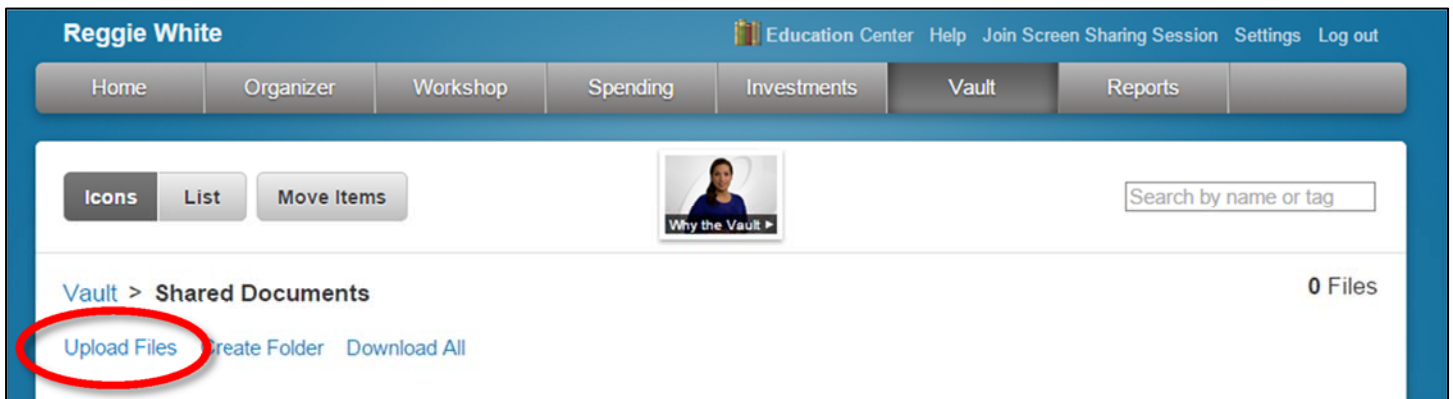
The **Vault** provides secure portal to transfer documents in electronic format. The Vault is a secured place to store and transfer documents.

To upload a file to be shared with Schaefer Financial Management follow these steps:

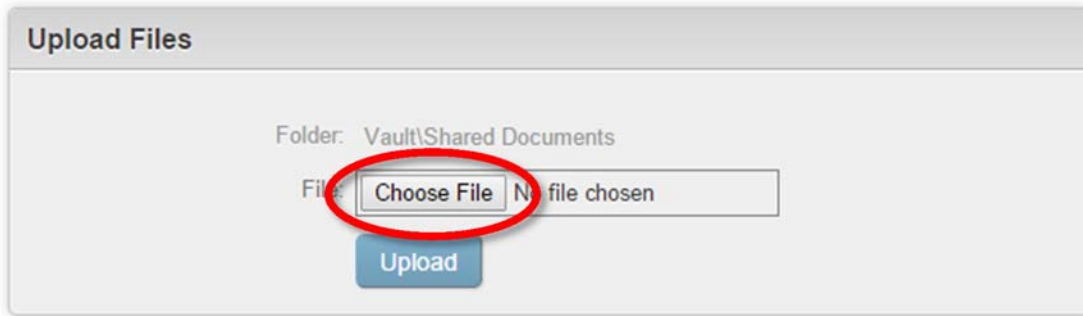
- Click on **Shared Documents** under the **Vault** Section (The My Documents folder is meant for you to use for personal documents. SFM will not be able to see any of the documents in this folder.)



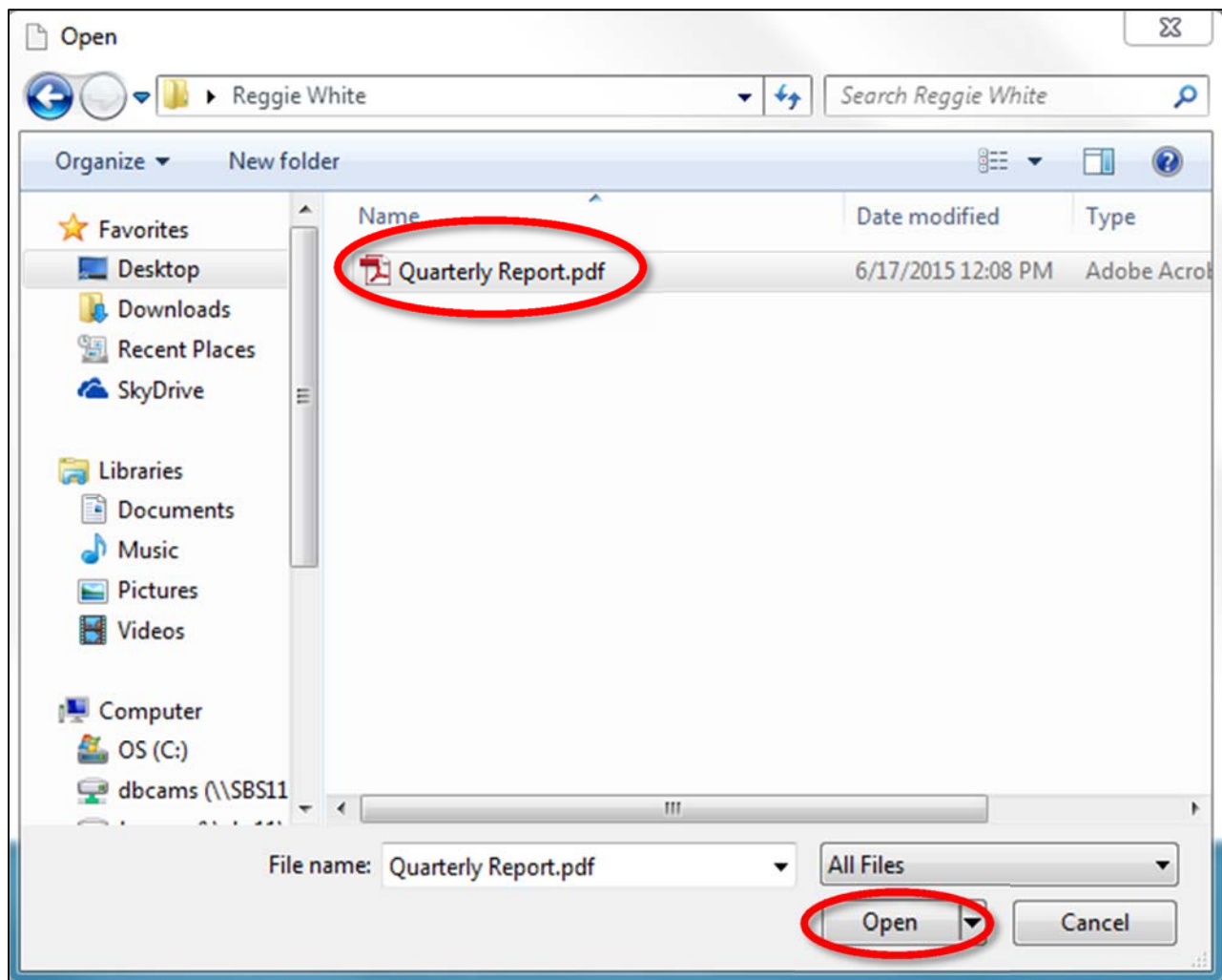
- Click on **Upload Files**



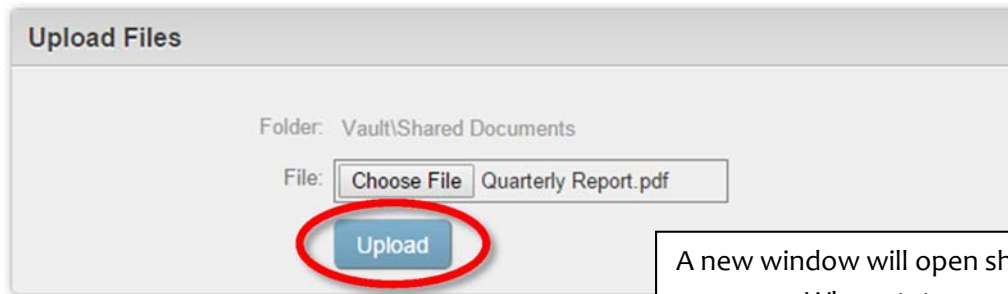
- Click **Choose File**



- Select the file you wish to upload and click **Open**

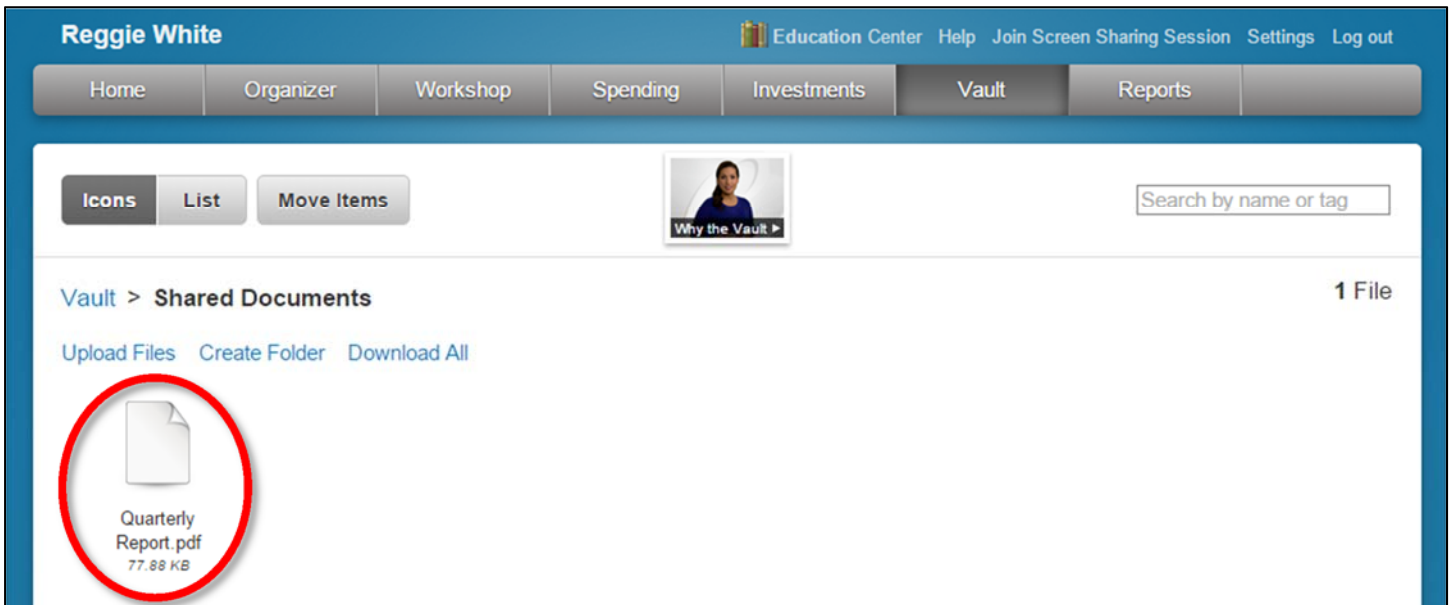


- Click **Upload**

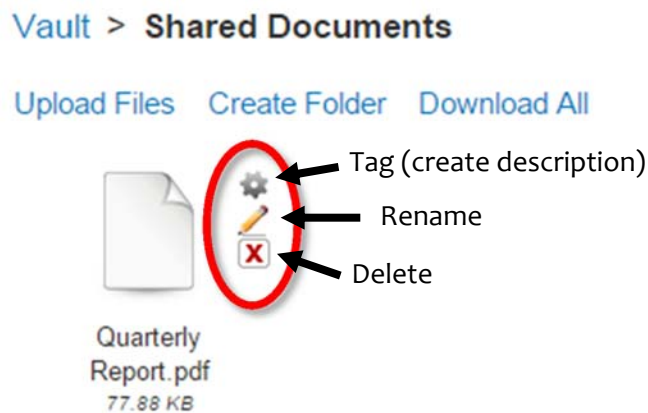


A new window will open showing the progress. When status says complete close the window.

- The file will be placed into the Shared Documents folder

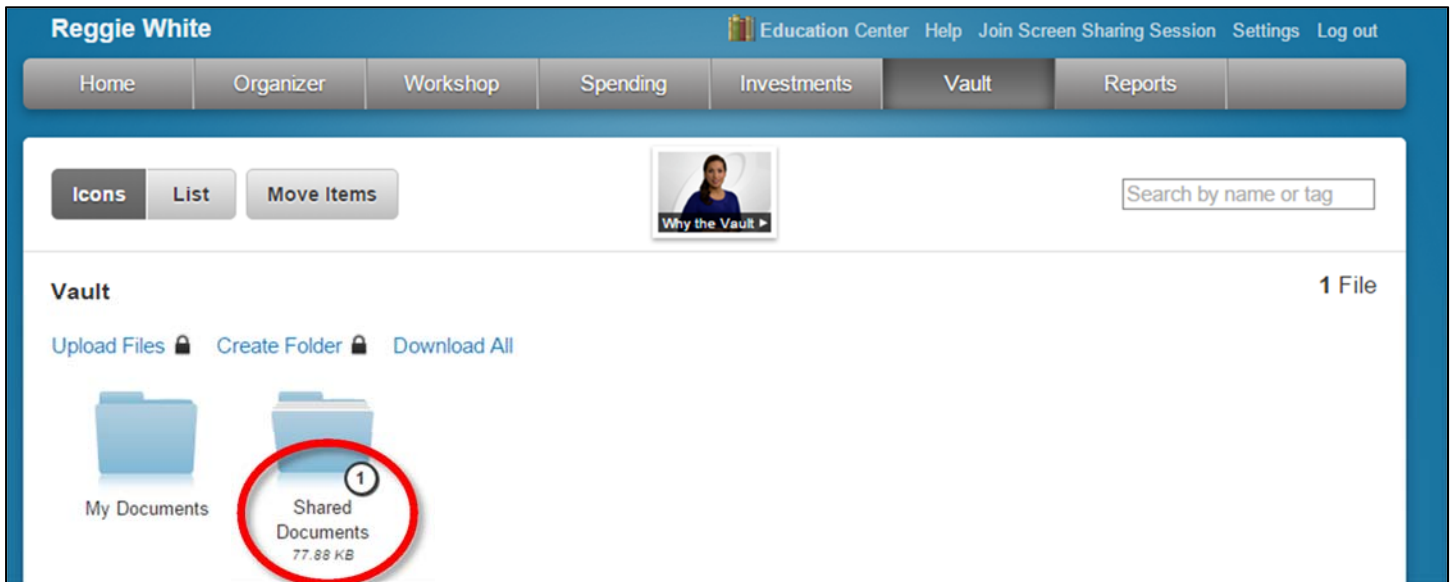


- To edit the file, see options that appears when you roll your mouse over the file

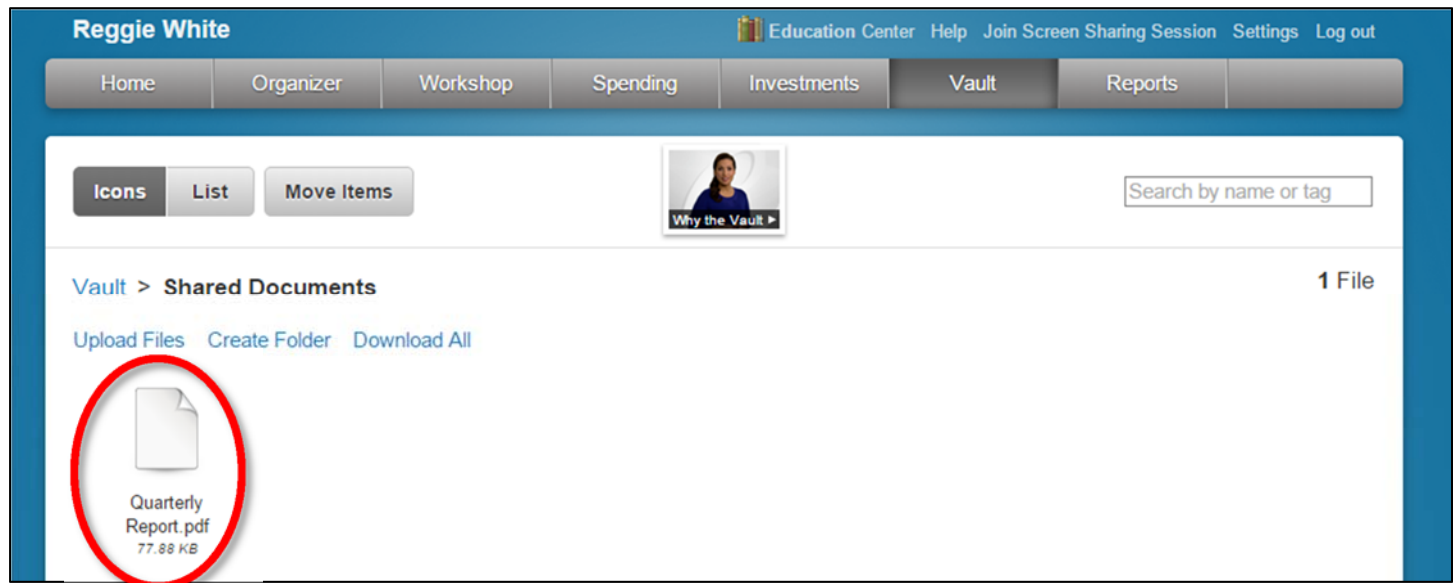


To download a file that has been shared follow these steps:

- Click on Shared Documents under the Vault tab



- Click the document you wish to download



- The document will be downloaded onto your computer. It will either be opened in a new window, be downloaded to a bar on the bottom of your browser that you most click to open, or be downloaded onto your computer depending on your browser.