



## 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.)

The screenshot shows the SFM Vault interface. The top navigation bar includes Home, Organizer, Workshop, Spending, Investments, Vault (circled in red), Reports, a checkmark icon, and a bell icon. On the right, there are links for Help, Settings, and Sign Out. Below the navigation bar, the 'Vault' section has buttons for 'New Folder' and 'Upload Files'. A search bar with the text 'search by name' and a 'Search' button is present. A table lists folders:

| Name             | Size    | Shared | Created             |
|------------------|---------|--------|---------------------|
| My Documents     | 0 Files | ✔      | 1/9/2015 at 5:21 pm |
| Shared Documents | 3 Files | ✔      | 1/9/2015 at 5:21 pm |

Usage: 170.03 KB (0 B are private)

- Click on **Upload Files**

The screenshot shows the SFM Vault interface with the 'Vault' menu item selected. The top navigation bar is the same as the previous screenshot. The 'Upload' button in the top right corner is circled in red. Below the navigation bar, the 'Vault' section has buttons for 'New Folder' and 'Upload'. A search bar with the text 'search by name' and a 'Search' button is present. The breadcrumb 'Files > Shared Documents' is visible. A table lists folders:

| Name             | Size | Shared | Created |
|------------------|------|--------|---------|
| Shared Documents |      |        |         |

Usage: 13.29 KB (0 B are private)

The ability to electronically retrieve or store your documents is provided for your convenience. These documents are not original, legal documents or official records nor are these documents intended to replace your original, legal documents or official records. Neither your representative nor any of their affiliates, agents, or employees provide legal, tax, or accounting advice. Please refer to the Terms of Service for additional information on Aggregation Services.

### 1 | Client Website Overview Guide

- Click **Choose File**
- Select the file you wish to upload and click **Open**
- The file will be placed into the Shared Documents folder
- To edit the file, see options under the Actions Tab

The screenshot shows the SFM Vault interface. At the top, there is a navigation bar with links for Home, Organizer, Workshop, Spending, Investments, Vault, Reports, and a notification bell. On the right, there are links for Help, Settings, and Sign Out. Below the navigation bar, the page title is 'Vault'. There are two buttons: 'New Folder' and 'Upload'. Below that, there is a breadcrumb trail 'Files > Shared Documents' and a search bar with the text 'search by name' and a 'Search' button. A table lists files with columns for Name, Size, Shared, and Created. One file is listed: 'Inbound Wire Instructions Schwab.pdf' with a size of 39.95 KB, a shared status (checked), and a creation date of 4/17/2018 at 4:35 pm. The 'Actions' dropdown menu for this file is open, showing options: Copy, Move, Rename, and Delete. Below the table, there is a usage summary: 'Usage: 53.23 KB (0 B are private)'. At the bottom, there is a disclaimer: 'The ability to electronically retrieve or store your documents is provided for your convenience. These documents are not original, legal documents or official records nor are these documents, documents or official records. Neither your representative nor any of their affiliates, agents, or employees provide legal, tax, or accounting advice. Please refer to the Terms of Service for additional information on Aggregation Services.'

To download a file that has been shared, click on the file name.