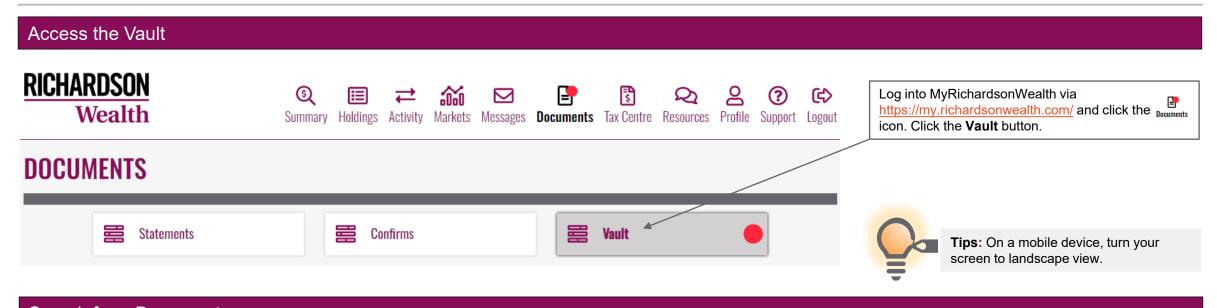
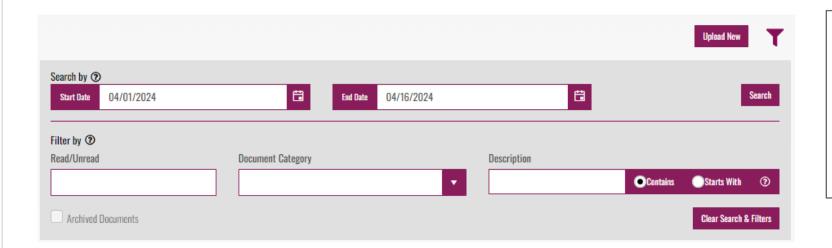
# Quick Reference Card - View and Upload Documents to the Vault





### Search for a Document



Use the **Search by** to refine your search. You select the date range for your search. The search boxes can be used individually or in combination. After you have made your selections, click the Search button.

Use the **Filter by** to filter the pre-populated data or in conjunction with the **Search by** results. The filter works automatically as you make your selections from the options available or the text you enter in the description field.

Use the Clear Search & Filters to reset the search and filters.

# Quick Reference Card - View and Upload Documents to the Vault



### Understand the Vault icons

File Name	Document Category
Client Upload	Miscellaneous
Client Upload	Property & Other Investments
IA Upload	Financial Planning & Estate

Click on the **View Document** icon to see the content of the document. This will also allow you to print or save locally to your computer.

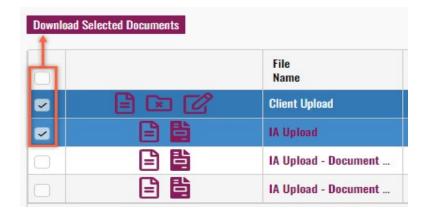
Click on the **Archive Document** icon to add the document to archive. To unarchive document, click on the **Restore Document** icon. Archived documents can be included in search results if the box **Archive Documents** is checked.

Click on the **Garbage** iii icon to delete documents that have been archived. Note: The garbage icon is only available for documents that have been marked as archived.

Click the **Edit** con to edit the document name, description, and visibility.

Click the **View Detail** icon to view file details of the upload document.

### **Download Documents from the Vault**



Click on the boxes at the beginning of the row, selecting at least <u>two</u> documents. Once you've made your selection, click **Download Selected Documents**.

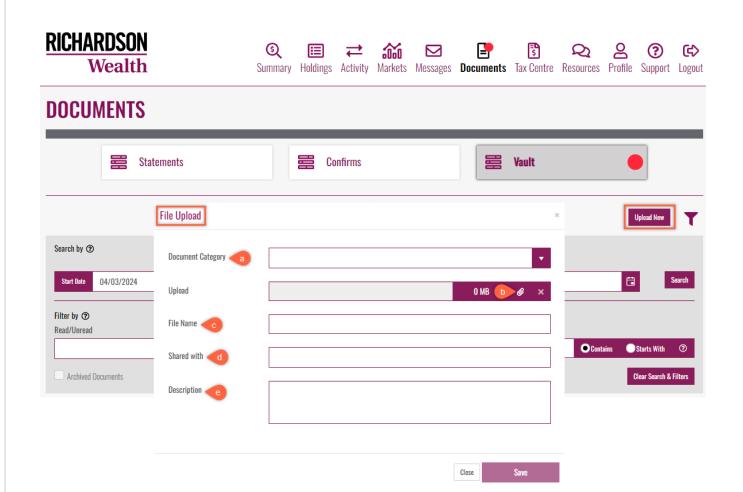
A window will open allowing you to name and save the file. Click on **Save**. This will create a file which can be saved locally to your computer. To access the downloaded files, go to your **Downloads** folder on your computer. Look for a folder with the name you created; the documents you selected will be within the folder.

You can download a maximum of 25 documents at one-time.

# Quick Reference Card - View and Upload Documents to the Vault



## Upload a new Document to the Vault



#### Click Upload New.

#### On the File Upload screen:

- a) Select a **Document Categoryy** from the dropdown menu.
- b) Click on the icon. This will allow you to access your files on your computer where you can search for and attach the desired document.
- c) Enter a **File Name**.
- d) Select your advisor in the **Shared with**: field.
- e) Enter a **Description** of the document being uploaded and shared.