

Quick Reference Card – View and Upload Documents to the Vault

Access the Vault

Log into MyRichardsonWealth via <https://my.richardsonwealth.com/> and click the  icon. Click the **Vault** button.

DOCUMENTS

Statements


Confirms


Vault






Tips: On a mobile device, turn your screen to landscape view.


Search for a Document

Upload New 

Search by 

Start Date 04/01/2024  End Date 04/16/2024  Search

Filter by 

Read/Unread Document Category Description Contains Starts With 

Archived Documents Clear Search & Filters

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.


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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Click on the **Garbage**  icon to delete documents that have been archived.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**  icon 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

Download Selected Documents

	File Name
<input type="checkbox"/>	
<input checked="" type="checkbox"/>	   Client Upload
<input checked="" type="checkbox"/>	  IA Upload
<input type="checkbox"/>	  IA Upload - Document ...
<input type="checkbox"/>	  IA Upload - Document ...

Click on the boxes at the beginning of the row, selecting at least two 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.

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Upload a new Document to the Vault

DOCUMENTS

Statements Confirms Vault

File Upload

Search by ⓘ

Start Date 04/03/2024

Filter by ⓘ
Read/Unread

Archived Documents

Document Category **a**

Upload 0 MB **b**

File Name **c**

Shared with **d**

Description **e**


Contains Starts With ⓘ

Clear Search & Filters

Close Save

Click **Upload New**.

On the **File Upload** screen:

- Select a **Document Category** from the dropdown menu.
- 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.
- Enter a **File Name**.
- Select your advisor in the **Shared with** field.
- Enter a **Description** of the document being uploaded and shared.