Desktop Vault Overview

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.

> **Please Note:**
> - Within your Vault there are two folders you can upload directly into – they are titled **My Private Documents** and **Shared Documents**.
> - Most file types are compatible, however .exe (executable) files are not supported.
> - The individual file size upload limit is 30MB.

Navigating the Vault

1. Click the **Vault** tab from the top 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.

> **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** folders.

2. Once you click into either folder, you can now use the **New Folder** and the **Upload** button in the top right. Clicking the **New Folder** button allows you to create sub-folders for further organization of your files.
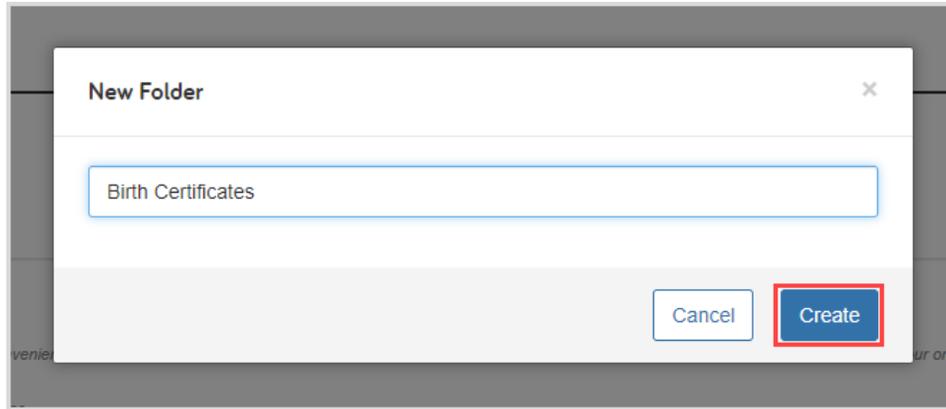
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3. After creating a new sub-folder, you will be prompted to enter the folder's name. Click **Create** when finished. Follow these steps to add as many sub-folders as needed.

Upload Files to the Vault

1. 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 sub-folder you have created, click the **sub-folder** first, then click the **Upload** button.


Note: Uploading a **folder** from your desktop will create a **sub-folder** in your Vault containing the files in that folder. Therefore, you may not need to manually create sub-folders in your Vault to upload to 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.

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2. 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.
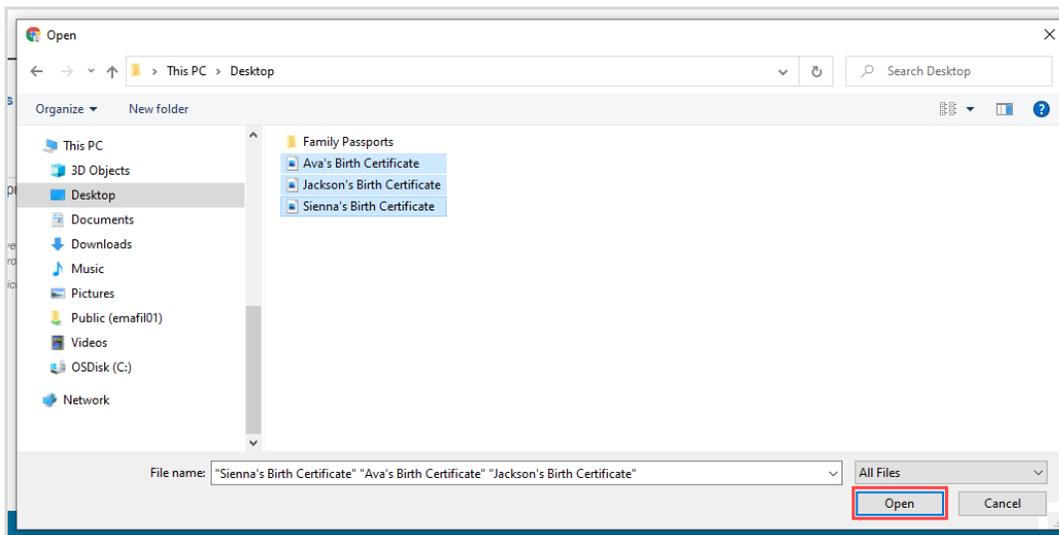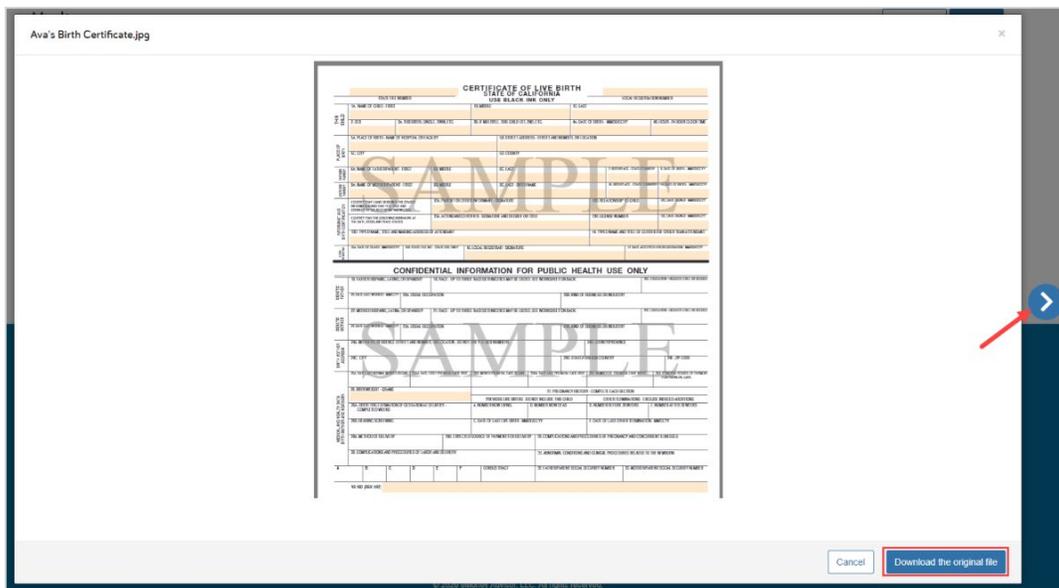
3. Once the files are successfully uploaded, you will see a green banner confirming the upload at the top of your Personal Financial Website.
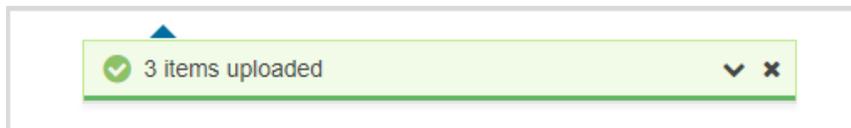
Vault "Actions"

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

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

> **Please 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. A final note, remember you can use the **Search** field to quickly filter through all of the files in your Vault.