

This guide is designed to assist with using the Client Vault in 1080 eMoney.

1. The secure Client Vault is a great way to organize and store important documents online. It's also a way for us to share documents with sensitive information outside of using email. From the Home page, click on **Vault** from the top menu.

Welcome
Steve and Stef Tester

Education Center Help Join Screen Sharing Session Settings Log out

Home Organizer Workshop Spending Investments **Vault** Reports

Manage your important documents in a secure Vault

FINANCIAL ALERTS MANAGE ALERTS

1080 Financial Group

Stephen Rischall
stephen@1080financial.com

Office: (855) 360-1080

[All Contacts](#)

NET WORTH TODAY

\$1,803,553

THIS MONTH **-\$209** **-0.01%**

YEAR TO DATE **+\$905** **+0.05%**

INVESTMENTS TODAY

\$869,911¹

CHANGE² **+\$2,635.64** **+0.30%**

ACCOUNTS[†] + Add

| | | |
|----------------|--------------------|---|
| Cash | \$39,740 | > |
| Credit Cards | -\$4,774 | > |
| Investments | \$867,802 | > |
| Life Insurance | \$21,594 | > |
| Loans | -\$364,897 | > |
| Property | \$1,250,000 | > |

SPENDING NET **\$9,632**

You've spent **\$12,297** in the last 30 days.

- Medical
- Mortgage & Rent
- Business

[More](#)

BUDGETS UNDER **\$7,227**

29 days remaining this month.

\$0 \$7,381

\$154

May 2

PROTECTION

| | | |
|------------|--------------|-----------|
| Whole Life | Stef Tester | \$500,000 |
| Whole Life | Steve Tester | \$500,000 |

[More](#)

TOUR GUIDE

Get an overview of how to get started with your personal financial website.

[GET STARTED](#)

- Please note that anything uploaded to the My Documents folder is **private** and only you will have access to it. We will use the **Shared Documents** folder to exchange documents from time to time. We may also add folders for you such as the Legal folder seen in the example below. Click on the folder you wish to upload a document to, for this example we will use the **Shared Documents** folder.

The screenshot shows the Client Vault interface. At the top, there is a navigation bar with tabs: Home, Organizer, Workshop, Spending, Investments, Vault, and Reports. Below the navigation bar, there are buttons for 'Icon', 'List', and 'Move Items'. A search bar is labeled 'Search by name or tag'. A profile picture of a woman is shown with the text 'Why the Vault'. The main content area is titled 'Vault' and shows '2 Files'. Below this, there are links for 'Upload Files', 'Create Folder', and 'Download All'. A table lists the folders:

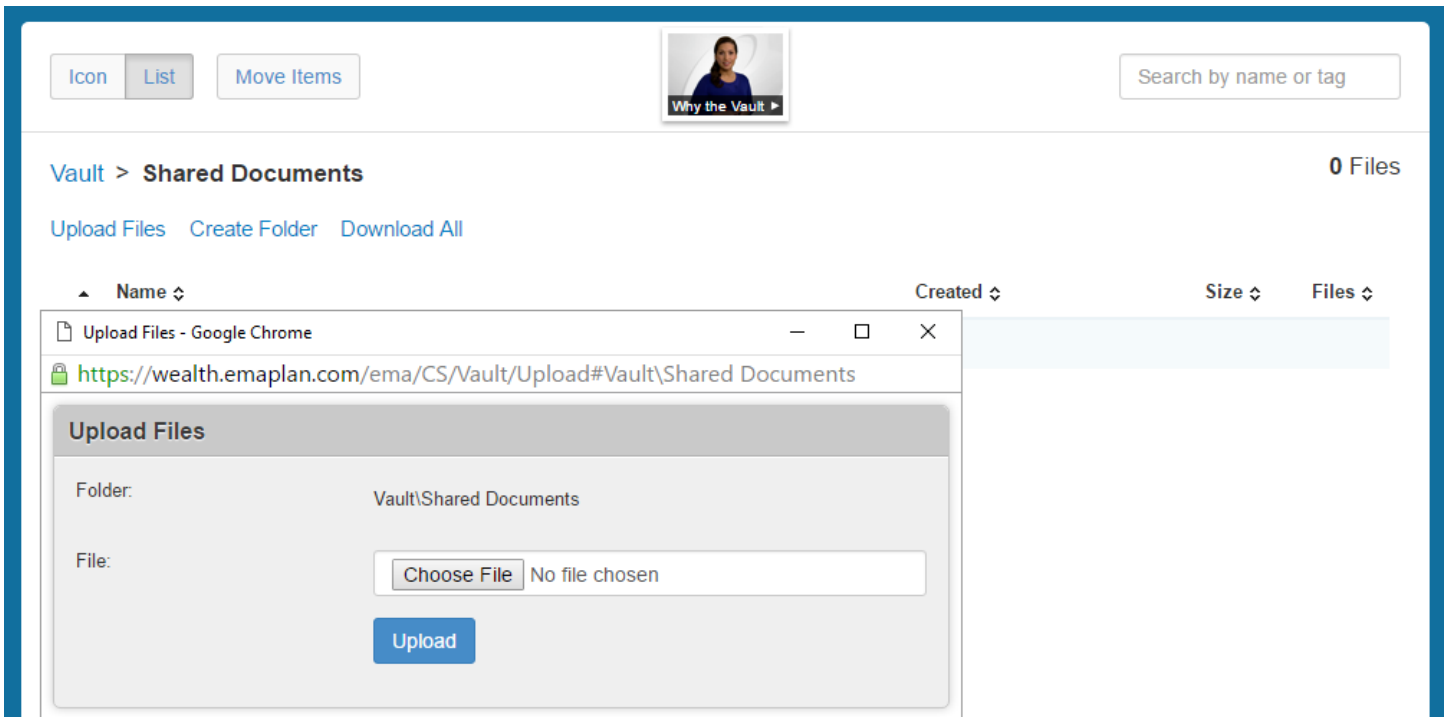
| Name | Created | Size | Files |
|------------------|------------------|-----------|-------|
| Legal | about 1 year ago | 174.05 KB | 2 |
| My Documents | about 1 year ago | - | - |
| Shared Documents | about 1 year ago | - | - |

- Currently this folder is empty. Click on the **Upload Files** link in to begin uploading a file to this folder.

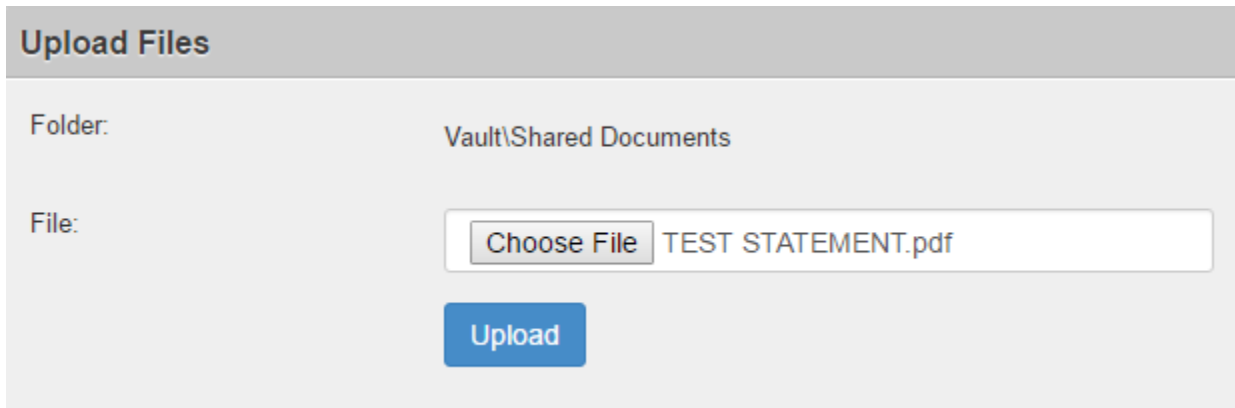
The screenshot shows the Client Vault interface with the 'Shared Documents' folder selected. The breadcrumb path is 'Vault > Shared Documents'. It shows '0 Files'. Below this, there are links for 'Upload Files', 'Create Folder', and 'Download All'. A text box says 'Upload one or more files'. A table header is visible:

| Name | Created | Size | Files |
|--------------------------------|---------|------|-------|
| This folder contains no files. | | | |

4. A dialogue box will appear asking you to choose a file from your computer to upload. Click on **Choose File** and use the file explorer window to help you navigate to the document you would like to upload.



5. Once you select the document to upload, the file name will appear next to Choose File and you can now click the **Upload** button to proceed.



- This is what it will look like once a document has been successfully uploaded to the Vault. Notice the **Status** is displayed as “completed” in the Upload Files dialogue box. The document should also appear inside of your Vault. Repeat this process to upload multiple files.

Vault > Shared Documents

1 File

[Upload Files](#) [Create Folder](#) [Download All](#)

| Name | Created | Size | Files |
|--------------------|------------------------|----------|-------|
| TEST STATEMENT.pdf | less than a minute ago | 84.41 KB | |

| Status | Name | Folder | Progress |
|-----------|--------------------|------------------------|---|
| Completed | TEST STATEMENT.pdf | Vault\Shared Documents | <div style="width: 100%; height: 10px; background-color: green;"></div> |

legal documents or official records nor are these documents employees provide legal, tax, or accounting advice.

- To open a Shared Document that has been uploaded to your system first click on **Vault** and then select the folder you want to view. Notice that the **Shared Documents** folder in this example currently contains only **1** file.

Vault

3 Files

[Upload Files](#) [Create Folder](#) [Download All](#)

| Name | Created | Size | Files |
|------------------|------------------|-----------|-------|
| Legal | about 1 year ago | 174.05 KB | 2 |
| My Documents | about 1 year ago | - | |
| Shared Documents | about 1 year ago | 84.41 KB | 1 |

8. After clicking the **Shared Documents** folder, you will see all the files contained inside that folder. Choose the file you would like to view from the list and click on it. The file will download to your computer and you will now be able to view it.

[Vault](#) > **Shared Documents**

1 File

[Upload Files](#) [Create Folder](#) [Download All](#)

| Name | Created | Size | Files |
|--|---------------|----------|-------|
| TEST STATEMENT.pdf | 6 minutes ago | 84.41 KB | |
| <div style="border: 1px solid gray; padding: 2px; display: inline-block;">TEST STATEMENT.pdf</div> | | | |