How to Use the Vault

1. Log into the Client Portal.
2. On the Welcome page, you will see the following tabs at the top of your screen...

3. Click on the Vault tab and you will be redirected to the folders within your personal Vault.
4. To retrieve or upload documents, locate the appropriate folder (i.e. Shared Documents) and click the folder name.
5. To ***retrieve*** documents, click on the document name and it will open in a separate window. You may choose to click the button to Download the original file and save it to your computer.
6. To ***upload*** documents, click on the Upload button in the upper right hand corner and choose the Files option to upload individual documents that have been saved to your computer. As an alternative, you can click and drag a document from File Explorer into the folder instead of using the Upload button.

Please Note:

- Clients can view documents saved in any folders. However, you are only able to upload documents into the “Shared Documents” or “My Private Documents” folders.
  - **Shared Documents**: For retrieving and returning ReView documents, and any other documents you wish to share with B&E.
  - **My Private Documents**: This folder is for your own personal use and B&E does not have access to view anything in this folder. Feel free to store your own personal documents for safekeeping and the ability to retrieve them virtually from anywhere.

If you have any trouble or have further questions, please contact Melanie Kriegler in our office.

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