



Get Started with **FutureVault**

A Simple Guide for Trusted Advisors

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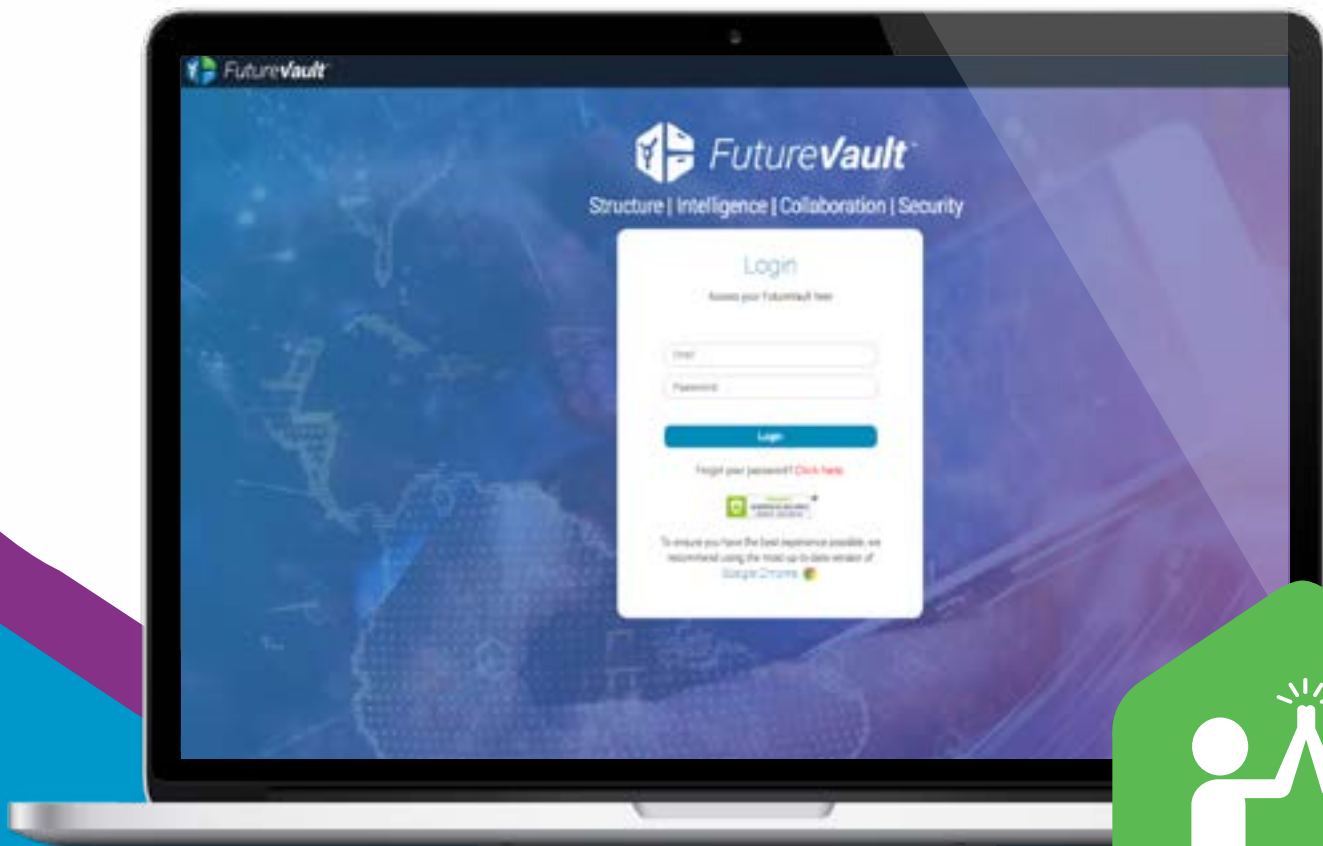


Hi There!

Welcome to FutureVault!

Now that you have been granted Trusted Advisor access to someone's Vault; you will be able perform actions like: view, upload and download documents, create folders, share and set reminders for important documents in accordance with the permissions set by the Vault owner.

FutureVault is a Digital Collaborative Vault that makes it easy for your clients or family to securely store, organize and share personal, financial and legal information that is most valuable to them, their family and their business.



Let's discover your access!

After you activate your account you will find a list of all the accounts you have access to as a Trusted Advisor. To access one account, just click on the name of the VaultHolder. If you have your own Vault, your default view will be your "All" page. That will be your own Vault where you can keep all your documents.

To view the list of accounts you have Trusted Advisor access to, click on your name at the top-right corner and then click "Trusted Advisor Access List" or click the name of the Vault you want to access. You will know that you are signed into another person's Vault when you see the name of the VaultHolder in the top-right corner and below text that reads: "Signed in as Your Name".

01 Get Familiar with FutureVault

To ensure you start off on the right foot, we want to help you better understand the general terminology we use to talk about FutureVault.

GLOSSARY

- A. **Category (Level 1):** Predefined main folders that are named by topic, i.e. Accounting, Banking, Careers, Health & Medical, Taxes, etc. Users (VaultHolders or Trusted Advisors) cannot create these folders or file any document directly in them.
- B. **Document Architecture (Taxonomy):** Predefined set of categories and subcategories to help organize individual entities.
- C. **Entity:** An individual filing cabinet that allows for independent or combined dynamic views, collaboration and ownership. An Entity could be an individual, corporation, sole proprietorship, or family trust, etc. A Vault can have one or many Entities.
- D. **Suggested Filing Locations:** This feature uses OCR to categorize information and provide suggestions on where to file documents.
- E. **Folders (Level 3):** Folders that can be created by the VaultHolder, Administrators, Representatives and Trusted Advisors under a subcategory.
- F. **Inbound Email:** A unique email address created by the system for each Vault that allows individuals to send documents directly into a Vault. All documents sent to this Inbound Email will be stored in the Unfiled area. The VaultHolder needs to provide access to this area for others to be able to file the document.
- G. **OCR (Optical Character Recognition):** The recognition of printed or written characters by the system. OCR optimizes the use of Filing Suggestions and search of documents and contacts.
- H. **Search:** An OCR based functionality to find any document in a Vault. You can search for contacts, folder names, document names or a specific word within a document.
- I. **Share:** The ability to share a single document with an individual who does not need to have a vault or additional access. Their access may be restricted by adding an expiration date. This person can only read or download the document.
- J. **Sponsor Taxonomy:** Predefined set of categories and subcategories specified by the Sponsor appearing on the left side of the screen generally identifiable by a background color. Documents in the Sponsor Panel are typically generated by the Sponsor.



- K. **Subcategory (Level 2):** Predefined sub-folders that are related to a main Category. These folders cannot be edited, but documents can be filed in them.
- L. **Suggested Documents/Labels:** List of suggested documents/labels for a particular category.
- M. **Trusted Advisor:** An individual who has been granted permission to access a Vault. Depending on their permission they may have limited access to some areas.
- N. **Vault:** An account where documents are stored, organized and shared. The Vault has 3 main sections: Documents, Reminders and Contacts.
- O. **VaultHolder:** The owner of the Vault.

Document View Features

When you click on a document, you have the following features available:

- A. **Document Summary:** A form related to a document to maintain a summary of the most important information inside the document.
- B. **History:** A list of all activities performed by each role related to a specific document. For example: views, uploads, edits, sharing, deletions and document recovery.
- C. **Reminders:** Create reminders for yourself or anyone in the contact list in relation to a specific document.
- D. **Share:** You can share documents with anyone, even if they don't have an account. The person will receive an email with a link to view and download the document, if they need it. You can also set an expiration date to limit their access.

Help & Support

- A. **What's New:** A highlight of the improvements and new features added
- B. **FAQ (Frequently Ask Questions):** We have an Online Help Center where you can find quick answers on how to use the platform.
- C. **Get Help:** A direct link to contact your Customer Support Team for extra help.
- D. **Feedback:** We want to hear what you think about the platform. Send us an email today and help us make FutureVault better.



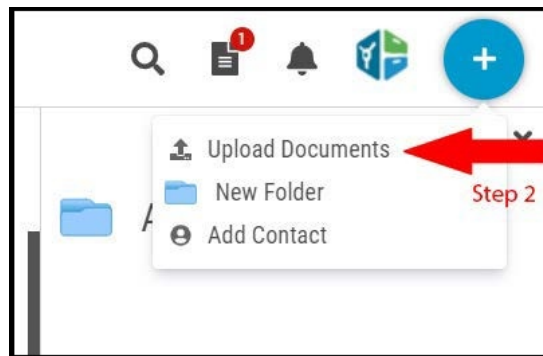
02 Upload Documents

2.1 Upload Button (+)

Step 1. Add documents to a Vault by clicking the “+” button on the top right of the screen. A drop-down menu will appear with options.

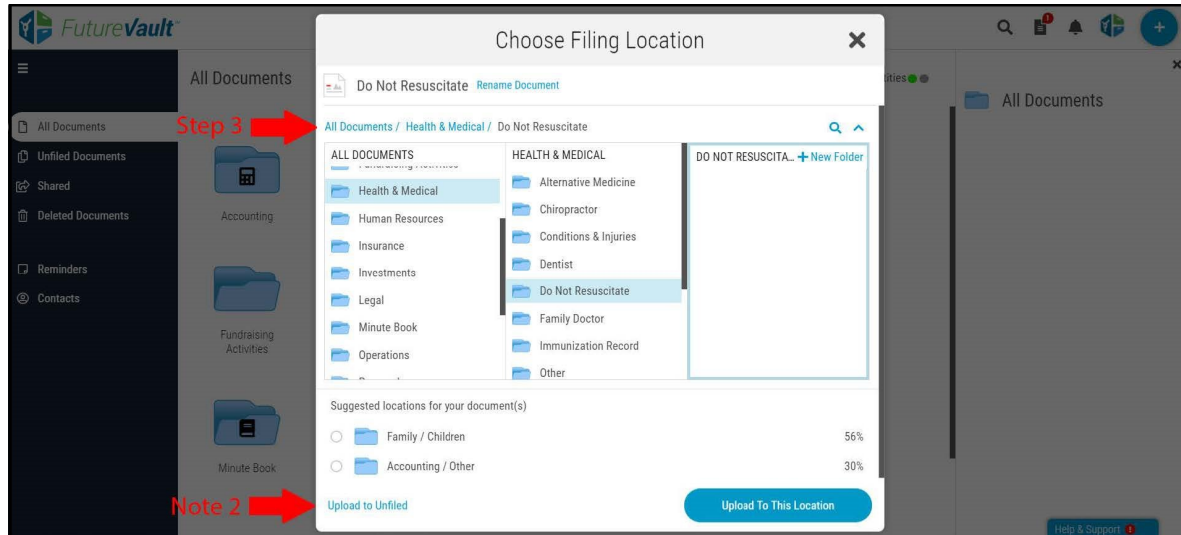


Step 2. Select Upload Documents to browse documents on your computer.



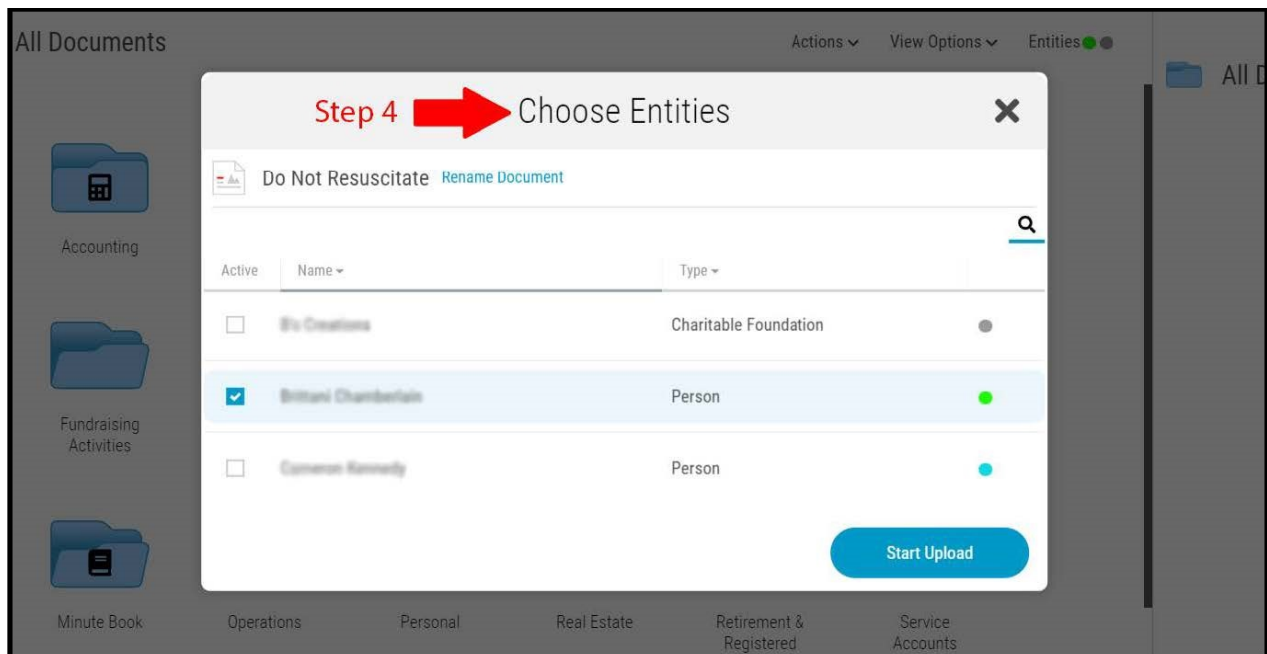
Step 3. Select the category and subcategory where you would like to save the document. Click **"Next"**.

NOTE 1. You can also search for a folder or use our **"Suggested Locations"** feature which provides recommendations based on the text in the document.



NOTE 2. You always have the option to skip and file later by clicking on "Upload to Unfiled" which will save the document in the **"Unfiled"** section. Depending on the permissions set by the Vault Holder, you may not have access to this area.

Step 4. You need to select the Entity(s) in which the document belongs and click **"Done"**.



NOTE 4. You can still **"Search"** for the document even if it has not been filed.

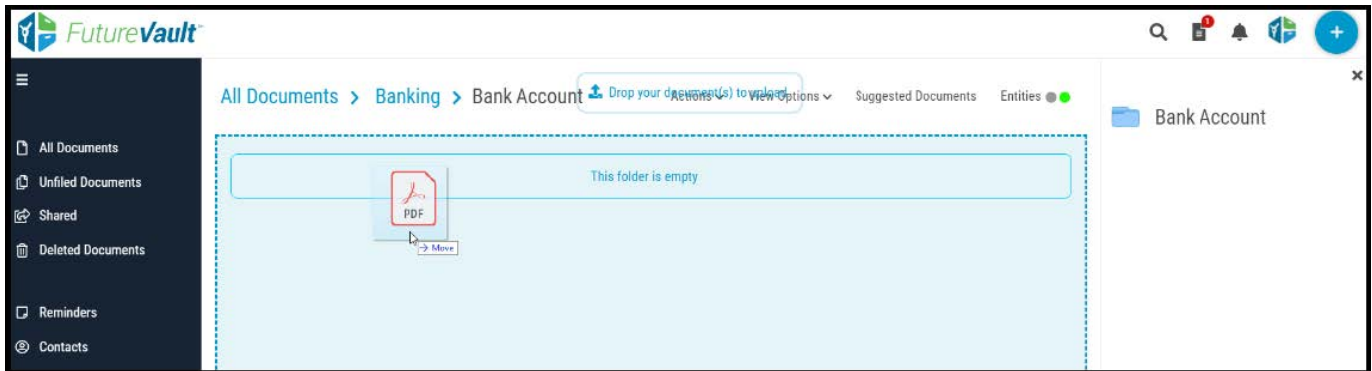


2.2 Upload into a Subcategory

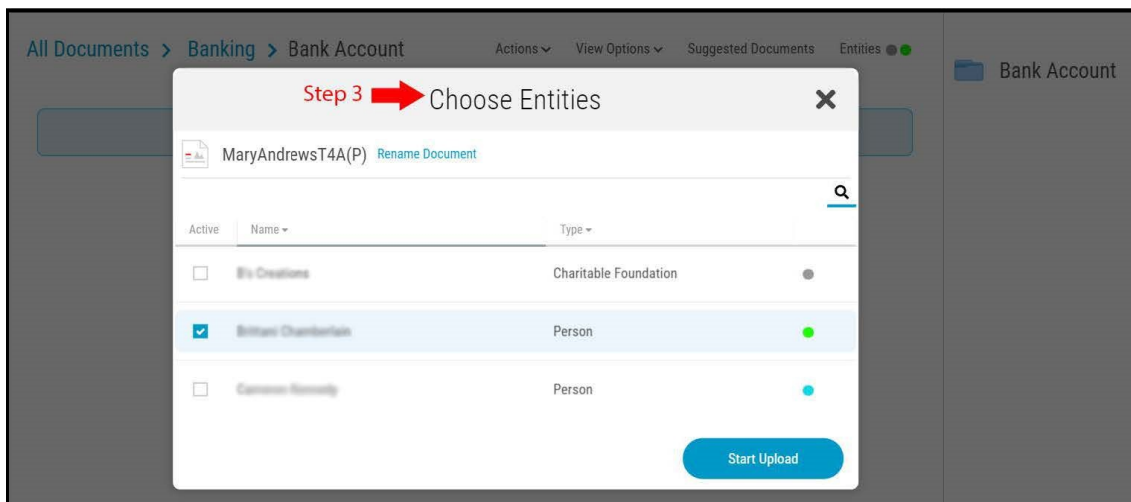
NOTE 1. You can upload documents directly into a subcategory by using the drag & drop feature or clicking inside the subcategory.

Step 1. Click on a category then click on a Subcategory that you would like to add documents to.

Step 2. “Drag and drop or click the + sign” to upload single or multiple documents from your computer.

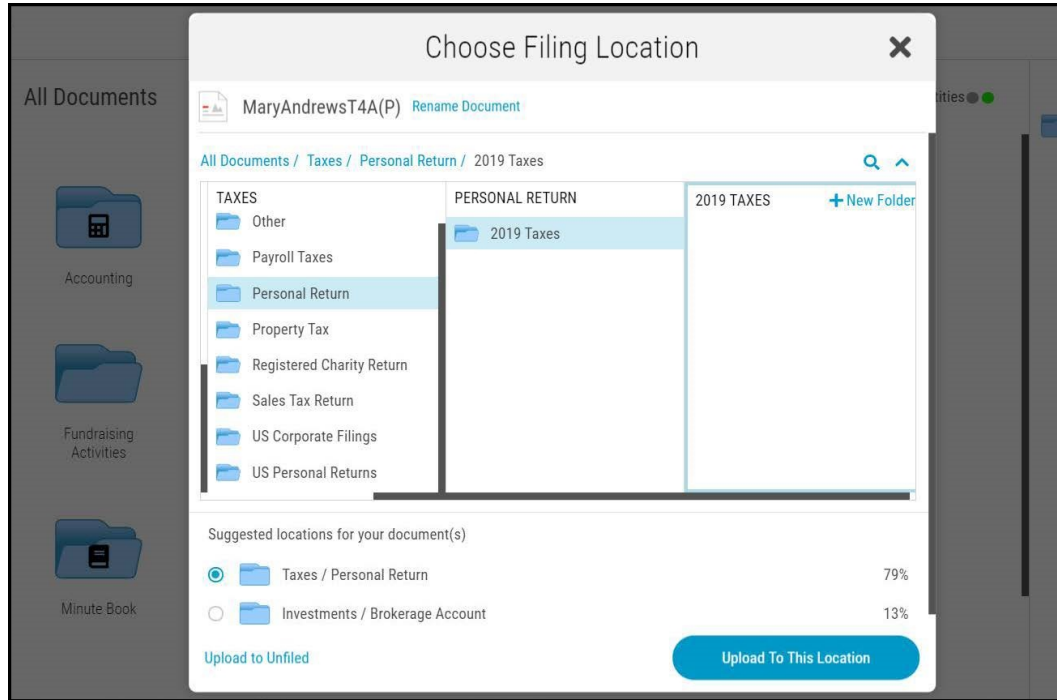


Step 3. If you have access to more than 1 Entity, a pop-up window will give you the option to assign document(s) to other Entities, click **“Continue”**. After you select the Entity(s), the document will be visible under the label you selected.



2.3 Upload into a Folder

Another way to get documents into a Vault is by dragging and dropping one or multiple documents into a Folder you have created ([Create a folder following instructions in Section 3](#)). Select a folder, then follow steps 2 and 3 from [Section 2.2](#).



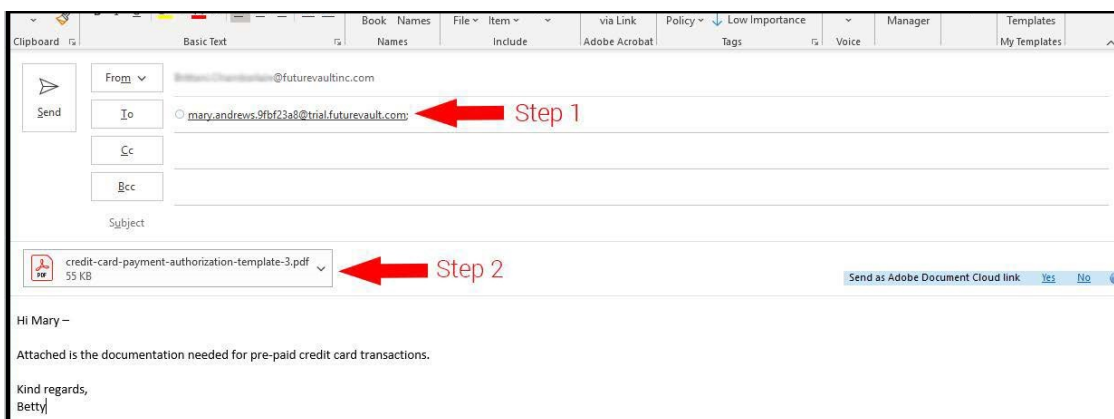
2.4 Upload using Inbound Email

Documents can be forwarded by email into the Vault by using the VaultHolder's personal inbound email address. You will have to ask the VaultHolder to provide you with this email address, or if you have been granted access to their "Unfiled" section you will see it there.

In order to file documents that have been sent by email, the VaultHolder will have to give you access to the "Unfiled" area as all documents emailed into the Vault will appear in this area. An email & in-app notification will notify the VaultHolder when a new document has arrived.

Step 1. Add the inbound email address to a new email or forward an older email to the inbound email address.

Step 2. Add a document or if there is one already in a previous email it will be forwarded in.



NOTE. All documents emailed into a Vault will appear in the "Unfiled" section.

If the document is sent by an unrecognized email address to the "Unfiled" section. A pop-up notification will alert you before moving the file to a Vault.

Step 1. You can add this email to the Trusted Emails list by clicking on the "Yes (Trust)" from the "Trust This Sender" note next to the file name.

Step 2. Then, click on the button "Trust this Email Address".

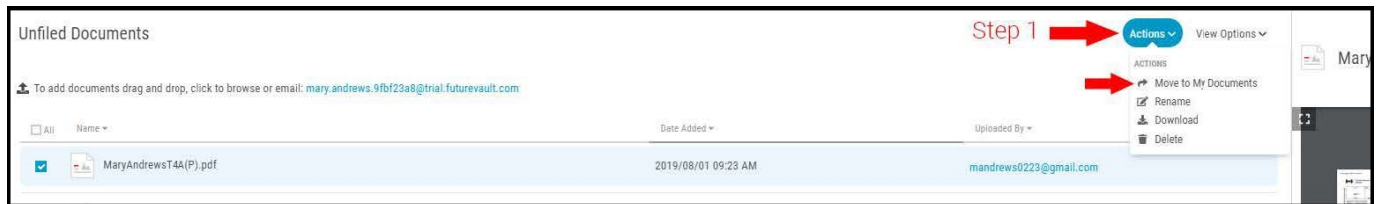


2.5 File from Unfiled

If the Vault Holder gave you access to the "Unfiled" area, you can also upload & file documents from this area

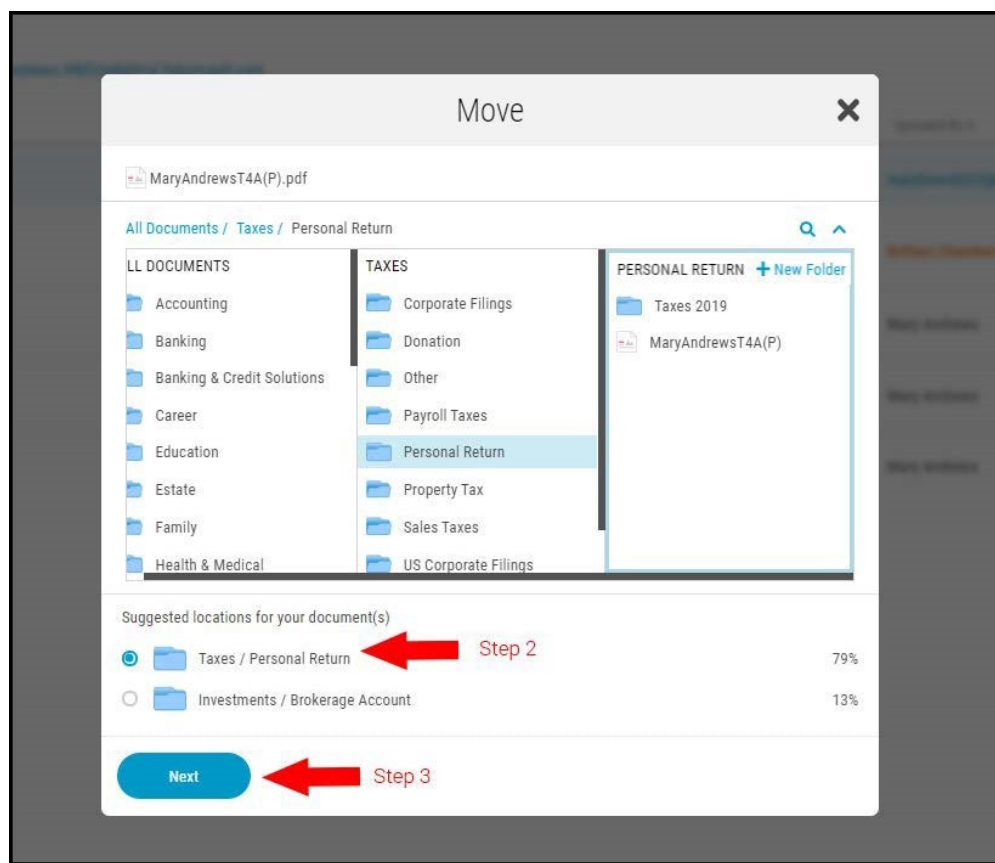
2.6.1 File a single document

Step 1. First, select the document you want to file or select "All Documents". A preview of the document will be displayed on the right side. Click on the **"Actions"** button and then **"Move to My Documents"**



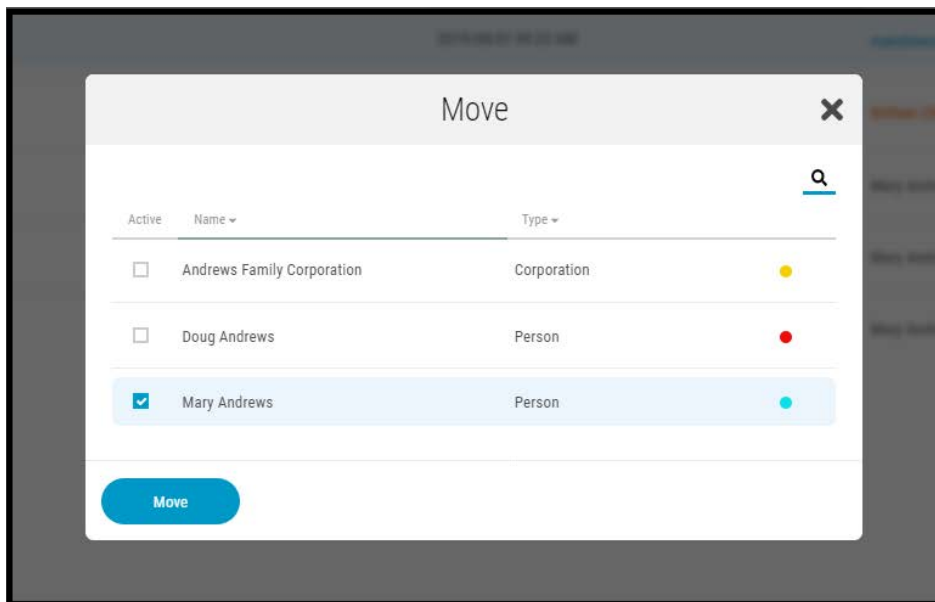
Step 2. A pop-up window will appear. Select the category and subcategory you would like to save the document or choose one of the Suggested Locations.

Step 3. After selecting a location, click **"Next"**.



Step 4. If you have access to more than one Entity, select the Entities in which the document belongs to and click **“Move”**.

Note. To file multiple Unfiled documents, select the documents you want or press Select All and follow Steps 1 - 4 from 2.6.1 File a Single Document

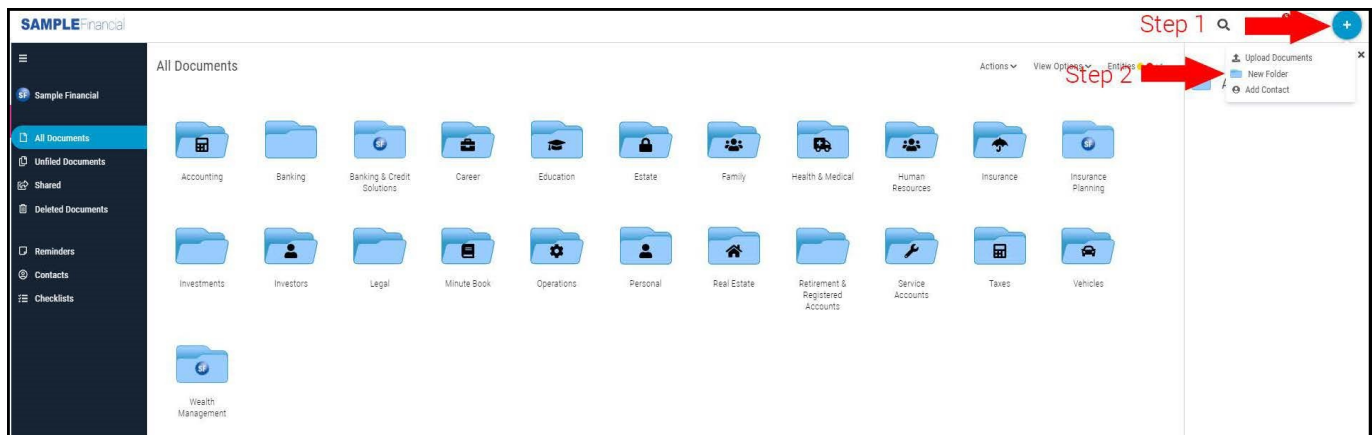


03 Create & Delete Folders

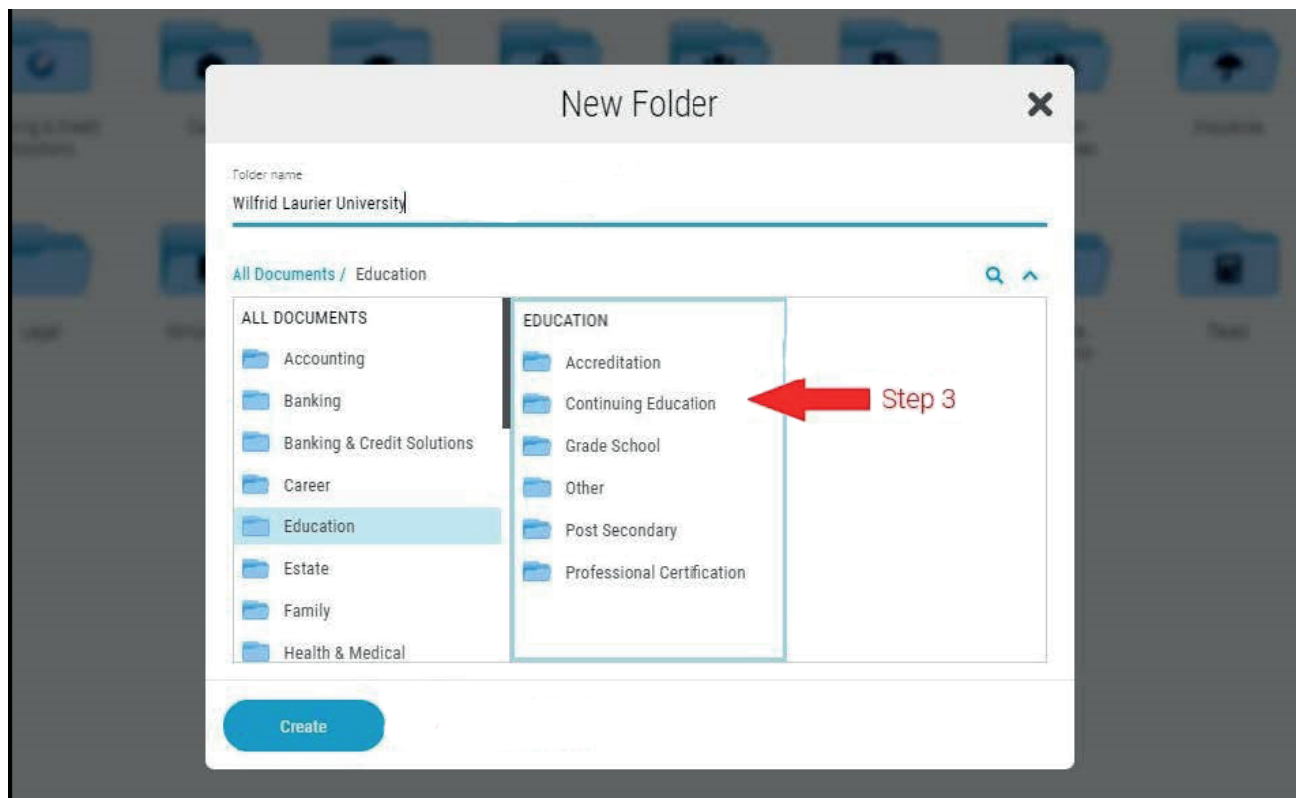
3.1 Create Folders

Step 1. Click on the "+" button in the top right corner.

Step 2. Click on the option to "Create New Folder".



Step 3. Type the name of the folder under the Level 2 - Subcategories and click "Save".



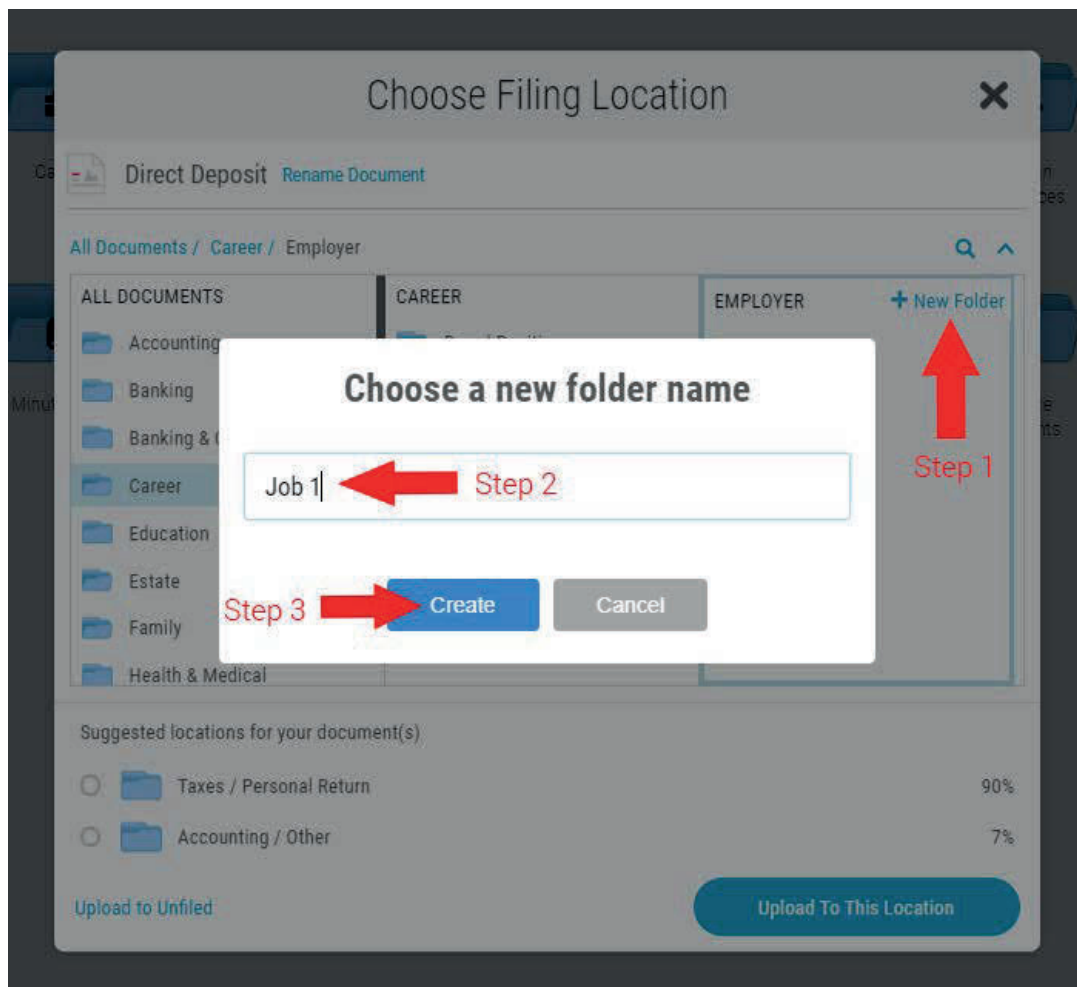
3.1.1 Create Folders When Uploading Files

You can create new folders in the directories you have access to when you are uploading a document. You can only create folders under subcategories or **Level 3** folders .

Step 1. After using the Upload button, you will see the directory of categories and the subcategories where you can save a document, click on the blue button **"New."**

Step 2. Add a name to the folder, then press **"Create."**

Step 3. Select the folder you just created and click the **"Upload to this Location"** button on the bottom right corner.

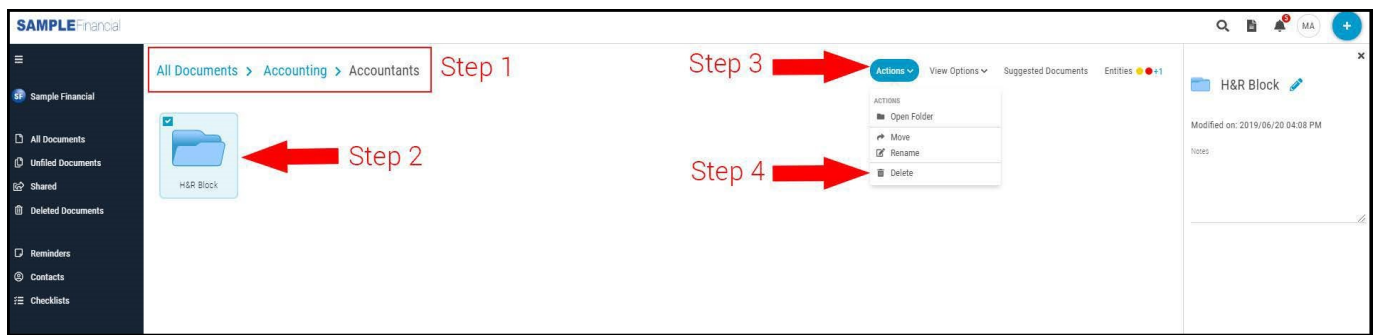


3.2 Delete a Folder

Step 1. To delete a folder, select the category then subcategory where the folder is filed and select the folder.

Step 2. Right click on the folder.

Step 3: Click the **"Delete"** button.



NOTE 1. If the folder contains documents, a message will appear stating **"You can not delete folders that contain documents. Delete the document(s) first."** You will need to delete or move any documents in the folder in order to delete the folder.



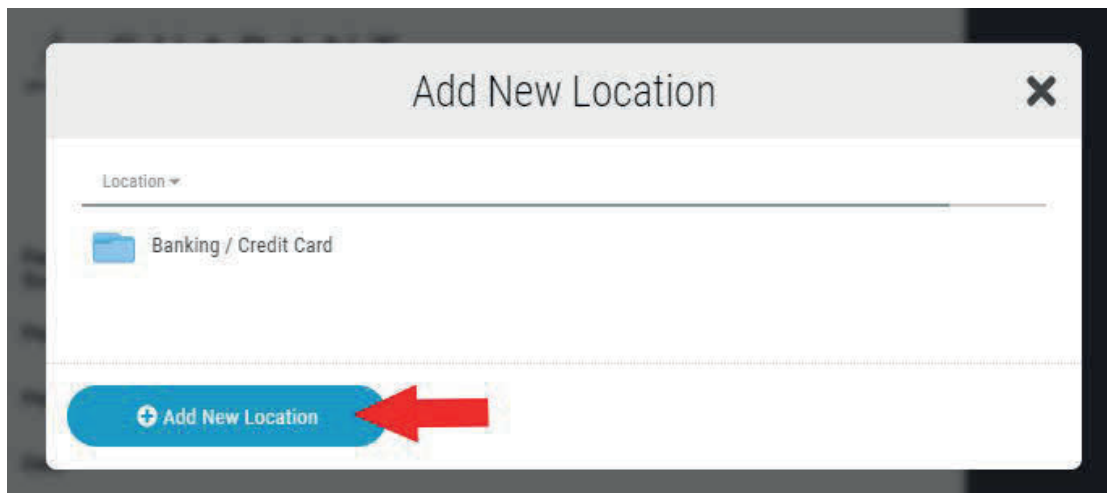
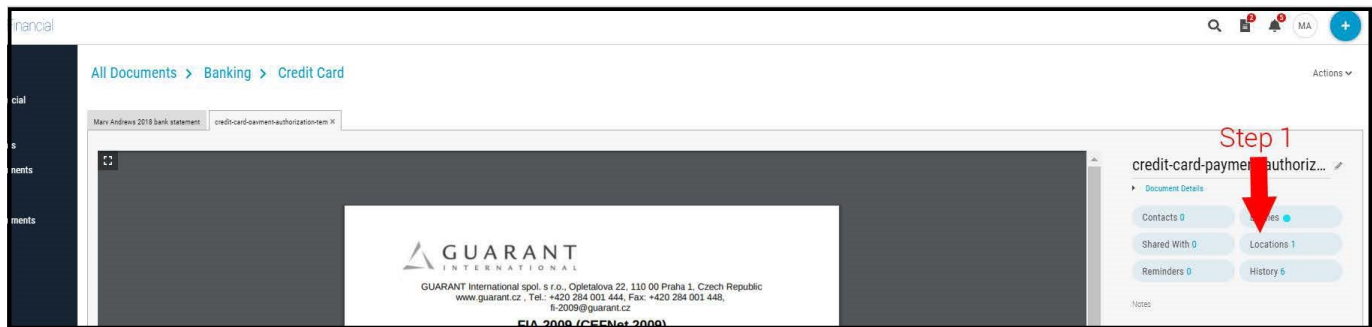
04 Document Management

4.1 Add Documents to Multiple Locations

4.1.1 Multiple Locations/Tagging

This feature allows a document to appear in multiple folders, but the document is stored in the system once. The document can be deleted from any tagged location but must remain in at least one location.

Step 1. In the document view, click **"Locations"** in the right column of the document page then select **"Add New Location."**

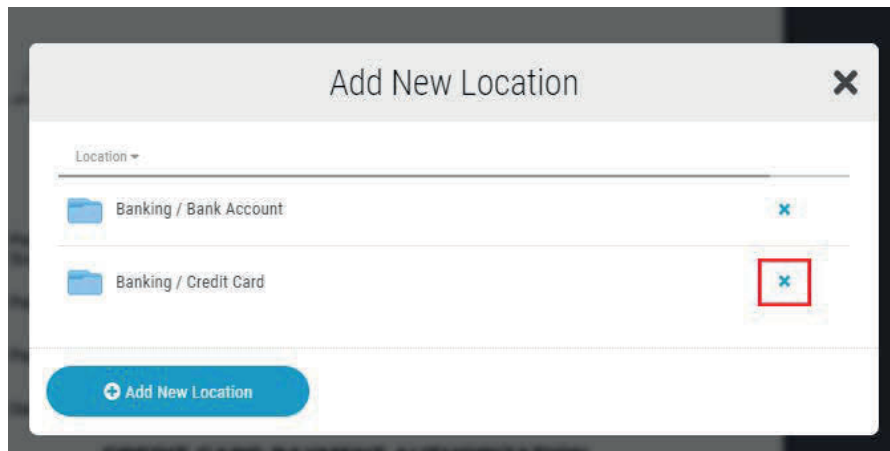


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Step 2. Select the other location in the directory and click on **"Add"**.

Step 3. The locations will appear below the document name. You can remove a tagged document from any location by clicking on the **"x"** next to the folder name.



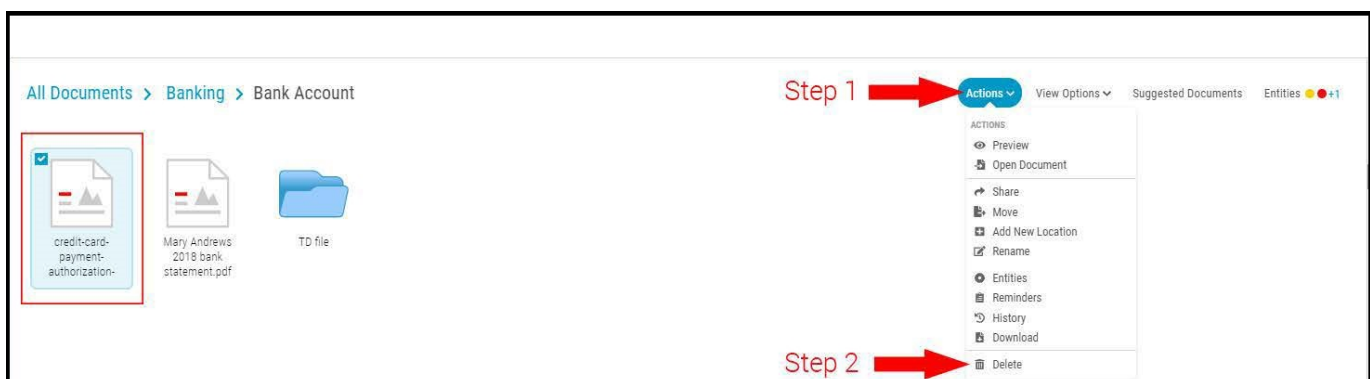
4.2 Delete and Restore Deleted Documents

As a Trusted Advisor you are able to trash documents and send them to the Deleted Documents area but you cannot permanently delete documents unless you have **Manager Access** ([please see the VaultHolder Manual to learn how](#)). You can also restore documents that have been moved to the Deleted Documents area from areas that you have access to..

4.2.1 Delete a Single Document

Step 1. Select the document you want to delete and right click.

Step 2. Select **"Delete"**



Step 3. A confirmation message will pop-up **"Document has been deleted successfully"**



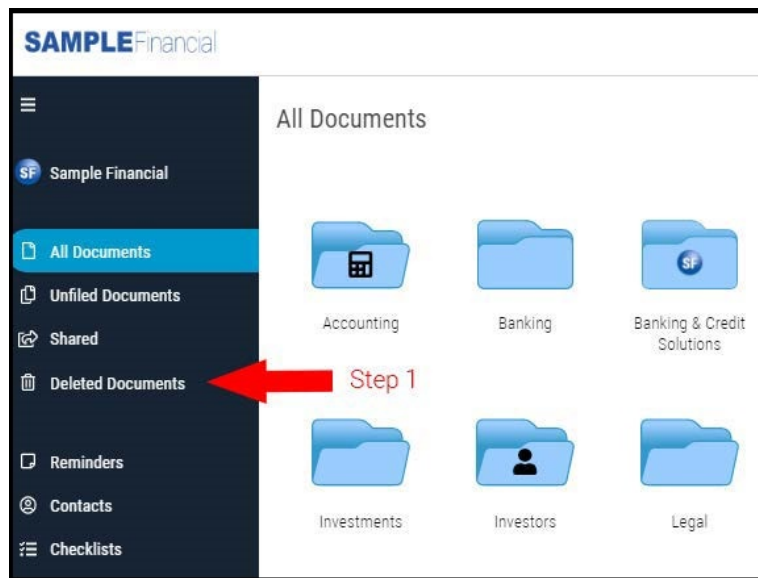
4.2.2 Delete Multiple Documents

While in a folder you can use the multi-select feature to delete more than one document.

Step 1. Select the check boxes beside the documents you want to delete and follow the steps mentioned in 4.2.1 Delete a Single Document.

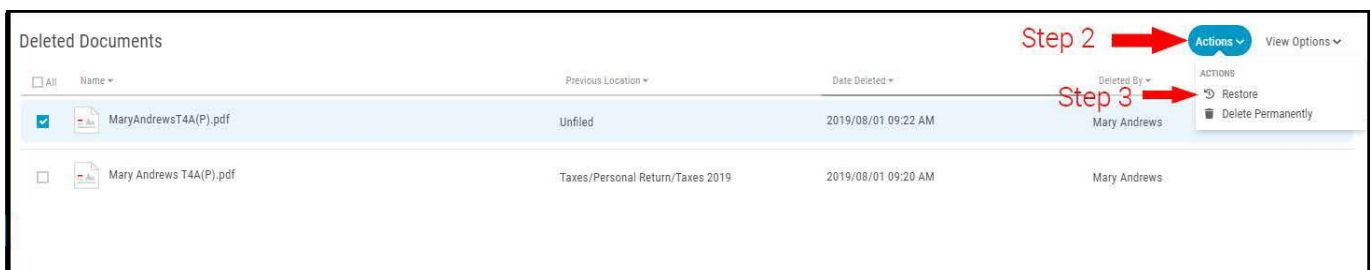
4.2.3 Restore Documents

Step 1. To restore a deleted document, select the “Deleted Documents” tab located on the left column.



Step 2. Find the document and select the “Actions” button and a drop-down menu will appear.

Step 3. Select “Restore” and this will place any document in its previous location.



Note. You can restore all documents in the “Deleted Documents” area by selecting the documents you wish to restore and then selecting the “Actions” button in the top left and then selecting “Restore Documents.”

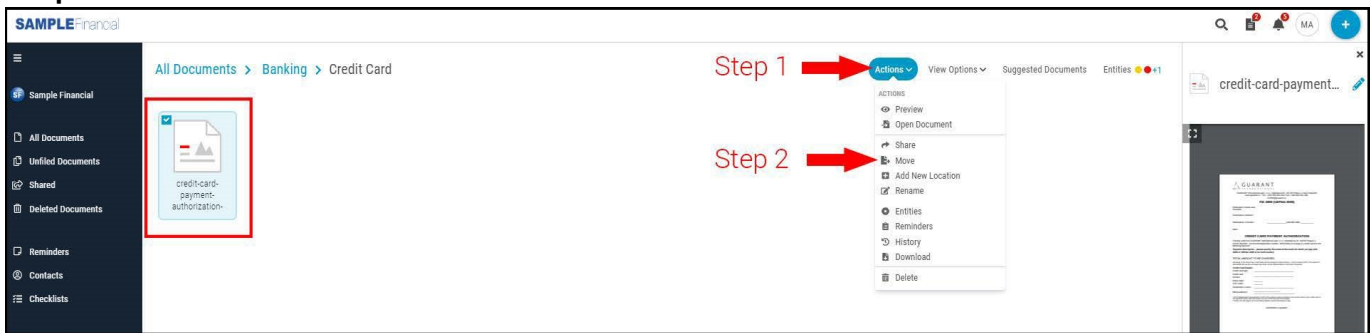


4.3 Move Documents

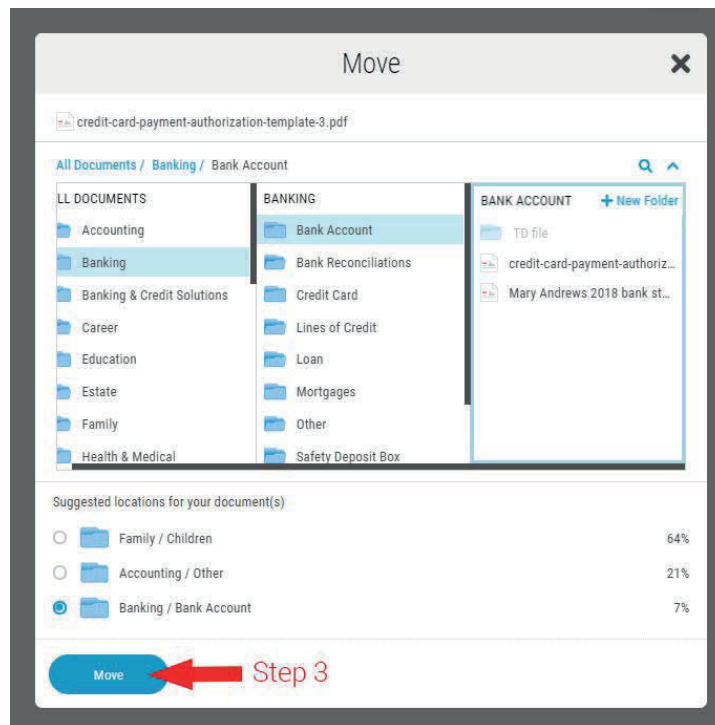
4.3.1 Move a Single Document

Step 1. Select the document you want to move and select the **"Actions"** button on the right side

Step 2. Click **"Move"**.



Step 3. Next select the category and subcategory, click the **"Move"** button in the bottom right corner.



Note. Moving multiple documents can be done simply by selecting the documents you wish to move and following Steps 1 - 3 from 4.3.1 Move a Single Document.

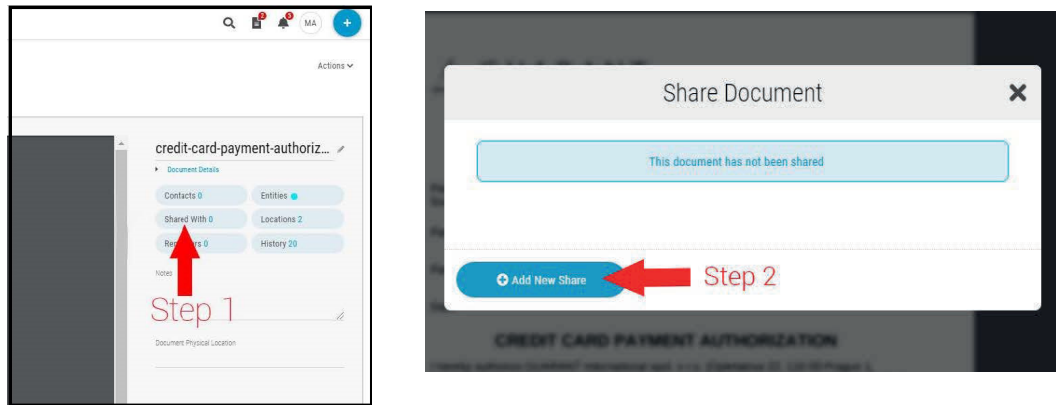


4.4 Share a Document

You can share documents with the VaultHolder's contacts (providing you have access to them) or you can send a link to other contacts outside of the Vault.

Step 1. To share a document, open a document and click on the **"Share"** tab on the right-side panel next to the document view.

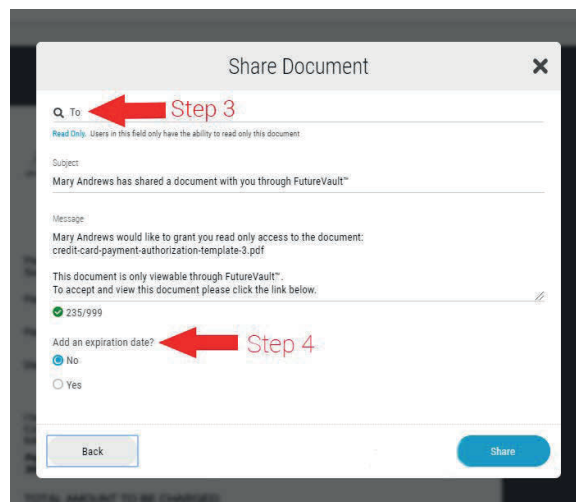
Step 2. Then click the **"Add New Share"** button to launch the sharing pop-up.



Step 3. If you have access to the VaultHolder's contact list and the person you want to share the document with is already listed, type their name. If the person is not a contact, you can type their email address and click enter. You can also send the document to multiple people at once.

Step 4. You can add an expiration date to limit the contact's access to the document. After the specified date, the contact will no longer be able to view the document. If you don't add an expiration date, the link will be active until you or the VaultHolder manually removes their access

Step 5. Press "Share" in the bottom right corner. .



NOTE 2. After you share a document, you can remove their access at any time, by clicking on the arrow next to **"View"** and select the option **"Remove Access"**.



4.5 Set a Reminder

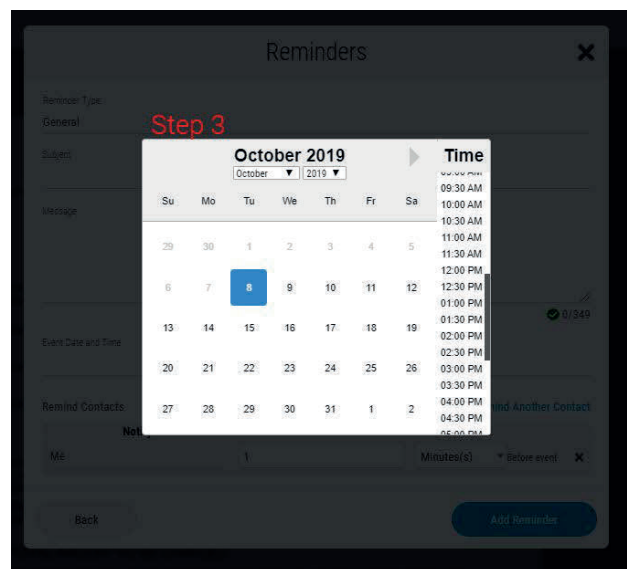
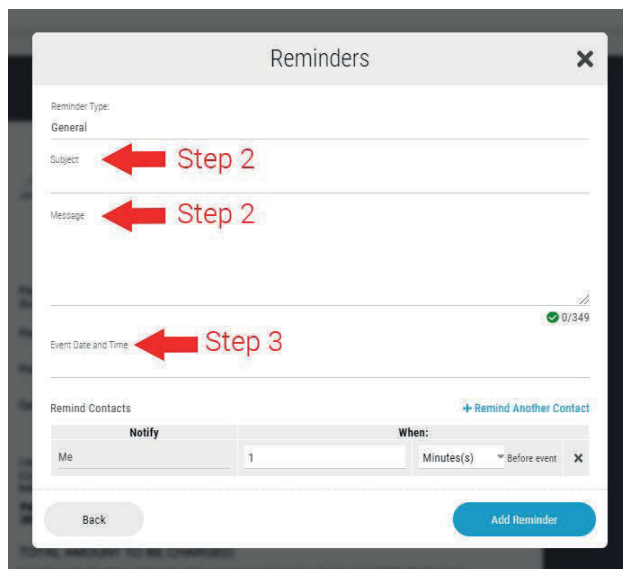
This feature allows you to set a reminder for yourself and others which will be sent by email. All reminders are attached to a specific document, and you can add more than one person to the same reminder.

Step 1. Open the document you want to create a reminder for, click the **“Reminders”** tab, then click **“+ Set a Reminder”**.



Step 2. Add the subject and body of the message for the reminder notification email.

Step 3. Select an Event date. For example, when is the expiration date of a passport, and click **“Done”**



Step 4. Click on “+ Remind Another Contact”, if you want to send the same reminder to another contact. Select the contact that you want to send this reminder to and when you want the reminder email to be sent (in days, weeks or months before the event date).

Step 6. Click “Save” to finish.

The screenshot shows a 'Reminders' modal window with the following fields and controls:

- Reminder Type:** A dropdown menu currently set to 'General'.
- Subject:** A text input field.
- Message:** A large text area for the reminder content.
- Event Date and Time:** A date and time picker.
- Remind Contacts:** A table with two columns: 'Notify' and 'When:'.

Notify	When:
Me	1 Minutes(s) Before event
- Buttons:** 'Back' (grey), '+ Remind Another Contact' (blue, with a red arrow pointing to it from 'Step 4'), and 'Add Reminder' (blue, with a red arrow pointing to it from 'Step 5').

Annotations in the image:

- Step 4:** A red arrow points to the '+ Remind Another Contact' button.
- Step 5:** A red arrow points to the 'Add Reminder' button.

All contacts added to the reminder will receive an email notification.

NOTE 2. You can preview all your reminders in the “Reminders” area located in the top menu. You will also be able to see all people associated to each reminder.



4.6 View Document History

Using the **"History"** tab, you can see all the actions related to a specific document, providing a full audit trail.

Step 1. To view a document's history, open a document and select the **"History"** tab.



In this section, you will see which user has viewed, shared, downloaded, moved or accessed the document. You will also see when a document has been viewed by those you have shared documents with using the "Share" tab.

Document History	
Date of action ▼	Details
2019/10/08 11:46 AM	Viewed by Mary Andrews
2019/10/08 10:35 AM	Viewed by Mary Andrews
2019/10/08 10:35 AM	Viewed by Mary Andrews
2019/10/08 10:35 AM	Viewed by Mary Andrews
2019/10/08 10:27 AM	Viewed by Mary Andrews
2019/10/08 10:15 AM	Viewed by Mary Andrews
2019/10/08 10:15 AM	Document restored by Mary Andrews
2019/10/08 10:15 AM	Viewed by Mary Andrews
2019/10/08 10:14 AM	Document trashed by Mary Andrews
2019/10/08 10:13 AM	Viewed by Mary Andrews
2019/10/08 10:13 AM	Viewed by Mary Andrews
2019/10/08 10:13 AM	Viewed by Mary Andrews
2019/10/08 10:08 AM	Document is copied to Bank Account Mary Andrews
2019/10/08 09:58 AM	Viewed by Mary Andrews
2019/10/08 09:58 AM	Viewed by Mary Andrews
2019/06/04 10:08 PM	Viewed by Mary Andrews

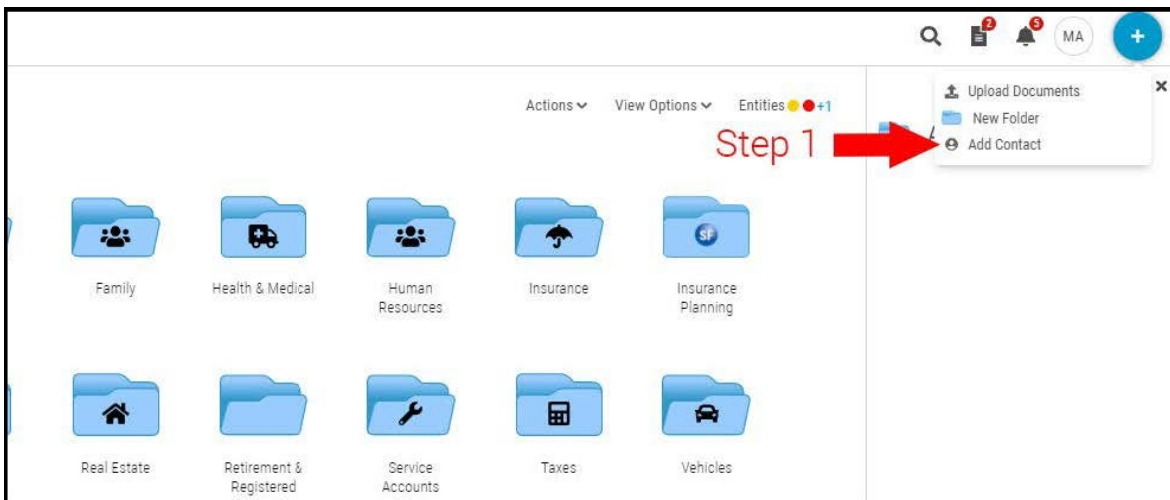


05 Manage Contacts

Providing the VaultHolder has given you access to manage their contacts, you can add contacts from different places in a Vault. You can set reminders and share documents with these contacts.

5.1 Add a Contact Manually

Step 1. Click on “+” and then “Add New Contact” on the top right corner.

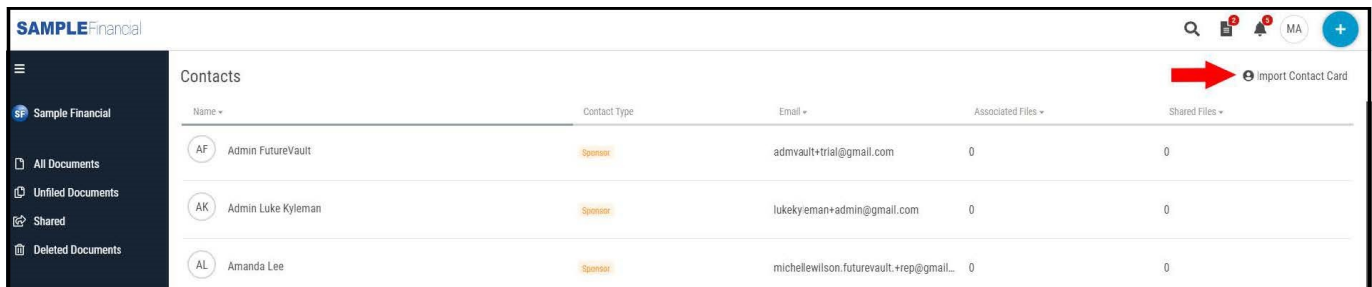


Step 2. A pop-up window will open. Complete the contact form and click “Create”. The mandatory fields are First Name, Last Name and Email.

A screenshot of the 'Add New Contact' pop-up form. The form has a title bar with 'Add New Contact' and a close button. On the left, there is a circular profile picture placeholder with an 'Add Image' button below it. The form fields include: First Name, Middle Name, Last Name, Title, Company, Phone, and Email. There are also links for 'Add New Phone Number' and 'Add New Email Address'. At the bottom, there are 'Cancel' and 'Create' buttons. A red arrow points to the 'Create' button.

5.2 Import Contact Card

Step 1. To import a contact, click on **“Import Contact Card”** on the top right corner.



Step 2. Locate the contact card in your computer and click **“Open”**.

NOTE. If a contact card is sent to a Vault using the inbound email, the system will automatically add it to the Contact list. Click **“Accept”** to save the contact card in to the Contacts list, or **“Remove”** if you do not want this contact in the Vault.

5.3 Edit Contacts

In the contacts area you are able to edit contacts.

Step 1. Click on a contact in the Contacts tab.

TO EDIT

Step 2. Make the changes in their respective fields, and click **“Save”**.

The screenshot shows the 'Edit Contact' form for a contact named 'BN'. The form is divided into two main sections. The left section contains personal information fields: First Name (Betty), Middle Name, Last Name (Norman), Title, Company, Phone, Email (mrandrews@futurevault.com), and Address. The right section shows 'Associated Documents' (0 Documents) and 'Shared Documents' (1 Document). At the top right, there are 'Cancel' and 'Save' buttons. A 'Help & Support' link is visible at the bottom right.



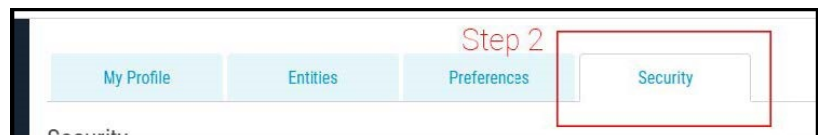
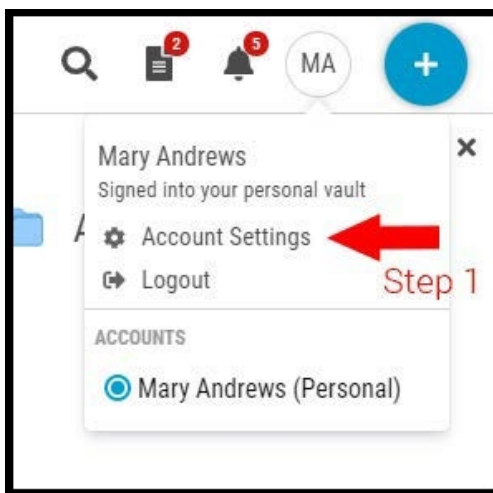
06 Security

To manage your security settings, click on Welcome **"Your Name"** in the top right corner, select **"Account Settings"**, and click on the Security tab. You can change your primary email, change your password, activate or deactivate the two-factor authentication and manage your security questions in this section.

6.1 Change your Primary Email

Step 1. Select **"Account Settings"**.

Step 2. Click on the **"Security"** tab.



Step 3. In the section labeled **"Primary Email"** type your current login email, next type the new email address, and re-type to confirm.

Step 4. Click **"Save"** and add your current password, then click **"Save"** again.

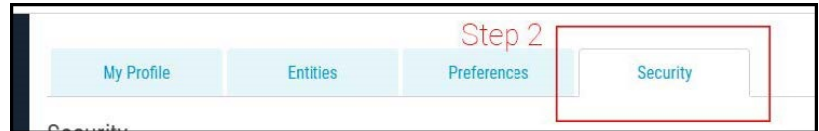
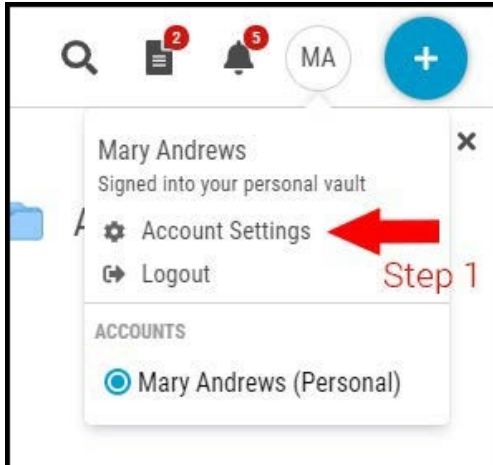
Step 5. You will receive an email with a 4-digit PIN to verify your new email address. Add the PIN number and click **"Ok"**.

 A screenshot of the 'Security' settings page. At the top, there are tabs for 'My Profile', 'Entities', and 'Preferences'. The 'Security' tab is active. Below the tabs, the 'Primary Email' section is highlighted with a red rectangular box, and the text 'Step 3' is written in red above it. Inside this section, there are three input fields: 'Enter Current Login Email', 'Enter a New Login Email', and 'Re-Type New Login Email'. At the bottom of the page, there are two buttons: 'Cancel' and 'Save'. A red arrow points to the 'Save' button, and the text 'Step 4' is written in red next to it.


6.2 Change your Password

Step 1. Select “Account Settings”.

Step 2. Click on the “Security” tab.



Step 3. In the section labeled “Change Password” type your current password, then enter the new password and re-type it to confirm.

Step 4. Click “Save”. A green note will let you know that your password was successfully reset.

A screenshot of the 'Change Password' form. The form is titled 'Change Password' and has three input fields: 'Enter Current Password', 'Enter a New Password', and 'Re-Type New Password'. A red box surrounds the entire form, and the text 'Step 3' is written above it. At the bottom of the form, there are two buttons: 'Cancel' and 'Save'. A red arrow points to the 'Save' button, and the text 'Step 4' is written next to it.

6.3 Manage your Two-Factor Authentication

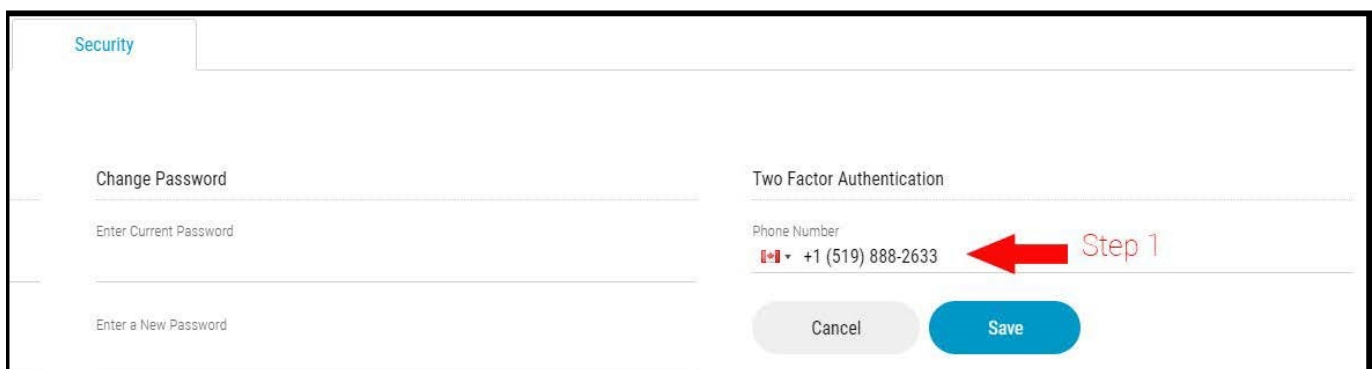
If you haven't already set up your Two-Factor Authentication when activating your account, you can activate it by adding a mobile number. You will need to add your password to confirm this action, then you will receive a text message with a 4-digit PIN to confirm your number.

Once you enable this security feature, logging in to a Vault will require you to enter a unique verification code sent via text message (SMS) to the mobile number you registered, in addition to your username and password. Every time that you sign in, you will be sent you a new code; however, if you always use your personal computer you can click on "Trust this computer", and you won't be asked again for the verification code.

6.3.1 Add or Modify your Phone Number

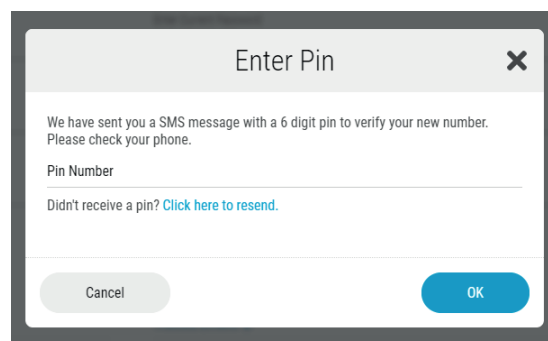
Step 1. To change the phone number for your Two-Factor Authentication, enter in the new mobile number, then click **"Save"**.

Step 2. A pin number will be sent to that phone number, enter that into the **"Pin Number"** field.



The screenshot shows the 'Security' settings page. Under the 'Two Factor Authentication' section, there is a 'Phone Number' field. A red arrow points to this field, which contains the number '+1 (519) 888-2633'. To the right of the arrow, the text 'Step 1' is written in red. Below the phone number field are 'Cancel' and 'Save' buttons. To the left of the phone number field, there is a 'Change Password' section with fields for 'Enter Current Password' and 'Enter a New Password'.

Step 3. After entering the pin, click **"Ok"**.



The screenshot shows a modal dialog titled 'Enter Pin'. It contains the text: 'We have sent you a SMS message with a 6 digit pin to verify your new number. Please check your phone.' Below this is a 'Pin Number' input field. A link says 'Didn't receive a pin? Click here to resend.' At the bottom are 'Cancel' and 'OK' buttons.

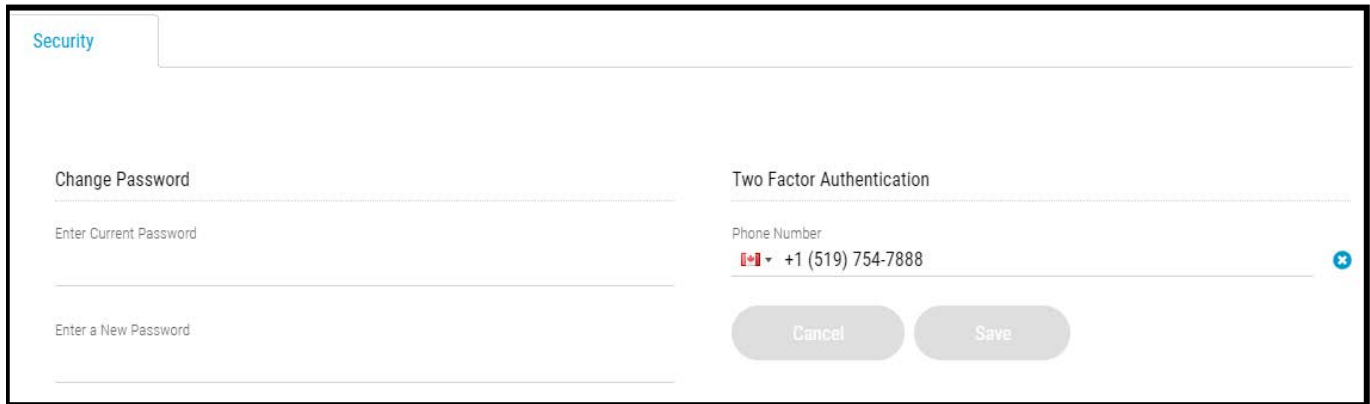
Step 4. After the prompt **"Your phone number has been changed successfully"**, click **"OK"**.



6.3.2 Deactivate your Two-Factor Authentication

You can deactivate your Two-Factor Authentication at any time.

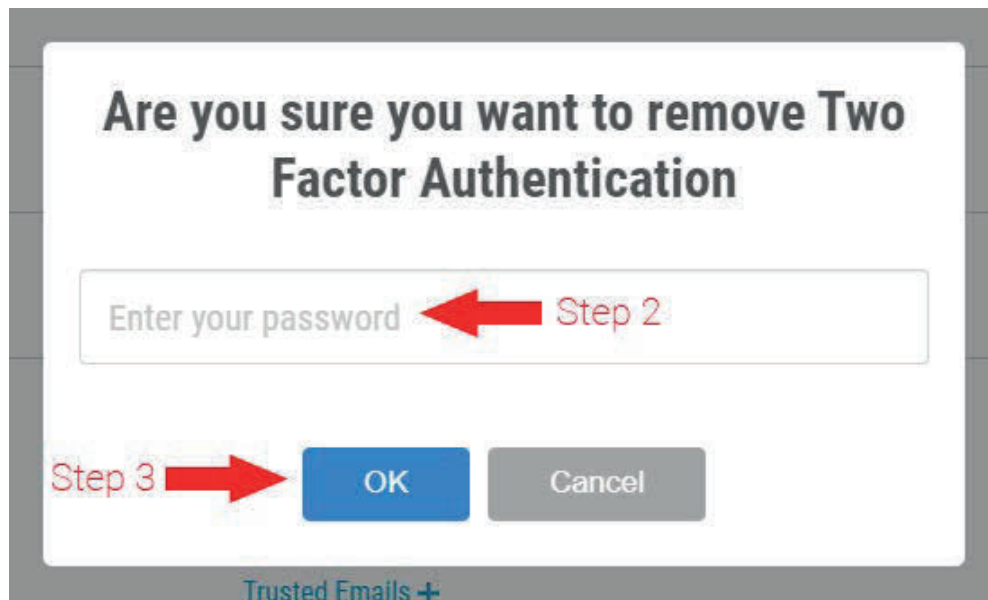
Step1. Click the “X” button.



The screenshot shows a 'Security' settings page. On the left, under 'Change Password', there are two input fields: 'Enter Current Password' and 'Enter a New Password'. On the right, under 'Two Factor Authentication', there is a 'Phone Number' field with a dropdown menu showing a Canadian flag and the number '+1 (519) 754-7888'. To the right of the phone number field is a blue 'X' button. Below the phone number field are two buttons: 'Cancel' and 'Save'.

Step 2. Enter your vault password to confirm this action.

Step 3. Then click “Ok” again.



The screenshot shows a confirmation dialog with the title 'Are you sure you want to remove Two Factor Authentication'. Below the title is a text input field with the placeholder text 'Enter your password'. A red arrow points from the text 'Step 2' to this input field. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'. A red arrow points from the text 'Step 3' to the 'OK' button. At the very bottom of the dialog, there is a link that says 'Trusted Emails +'.



07 Help & Support

The Help & Support tab is located at the bottom right corner of the screen. Here you can take a guided tour of the system, access our Frequently Asked Questions (FAQ) page, submit an incident to your help desk or send us your feedback about the platform.

In our Frequently Asked Questions (FAQ) page you will also find training videos and this Getting Started Guide.

Stay connected anytime and anywhere with mobile our mobile app, available for Android and iPhone. Learn more about what you can do in our mobile app in our Help Center.





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