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SmartVault Document Storage

SmartVault

www.smartvault.com

From the 2018 reviews of Document Management and Documents Storage Systems for accounting firms.

SmartVault Document Storage is a good fit for mid-sized accounting firms and other businesses that have large quantities of documents they wish to store online. In addition to document storage, a branded client portal is available, and the Team and Professional versions of SmartVault offers eSignature integration for quick, secure electronic document signing.

SmartVault is an online document storage solution that can be easily accessed from a variety of devices including a desktop system, web browser, or from a smart phone or tablet. SmartVault utilizes a PDF printer, where users can simply print a file to the PDF printer and save them in SmartVault, making it easy to store documents from any application.

For those using SmartVault on a desktop, the Connected Desktop feature offers easy

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Custom Vaults as needed. Users can easily store multiple versions of a single document for easy tracking, and deleted files are able to be retrieved if necessary.

SmartVault works with all TWAIN compatible scanners from Hewlett-Packard, Xerox, Eastman Kodak, Ricoh, as well as Fujitsu ScanSnap and Canon Image FORMULA scanners. Using a connected scanner allows users to easily upload multiple documents simultaneously. Users can also create full-text searchable PDF files when scanning by enabling the Optical Recognition (OCR) capability during the scanner setup process.

The SmartVault Portal allows users to access stored documents securely from any location. The portal can be custom branded for clients, with outgoing emails custom branded as well. Firms can provide clients with easy access to the portal in order to download confidential files, as well as upload any documents for firm use. An automatic alert will let clients and firm employees know when a document is uploaded or downloaded to the portal. Permission levels are set by the firm, with clients only able to access their own folder.

All documents stored in SmartVault are encrypted, whether in transit or residing on the secure server. All data is hosted in Houston, TX, with the facility offering video surveillance, physical barriers to entering the facility, and onsite security. In addition to sending documents through the SmartVault portal, users can opt to use the SmartVault plug-in for Microsoft Outlook that allows users to share documents safely via email converting attachments to secure links. An access log is also available that tracks access to documents, with data categorized as either confidential data or sensitive data.

SmartVault offers excellent integration with both QuickBooks Desktop and QuickBooks Online, as well as Xero and Freshbooks, with a toolbar plug available that allows users to scan and attach client source documents to any entry made in

any of the applications. SmartVault also integrates with tax applications such as

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price of the product, with users able to access support via telephone, chat, or email during regular business hours.

SmartVault is an excellent document storage solution, and can be particularly helpful to accounting firms or businesses using QuickBooks Online, QuickBooks Desktop, Xero, or Freshbooks. SmartVault is available for Business and for Accountants, with the Accounting Pro version \$40.00 per user per month. A Tax Prep version is also available for \$30.00 per user per month, with all plans offering a free 30-day trial.

2018 Rating – 5 Stars

Firm Management

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