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Mary Girsch-Bock • Sep. 16, 2019



SmartVault Document Storage

SmartVault

www.smartvault.com

From the 2019 reviews of [Document Management and Storage](#) systems for accounting firms.

SmartVault offers secure online document storage, and is a good fit for businesses and accounting firms of any size. The product is scalable, with plans available for small to enterprise level users. Along with online document storage, SmartVault also offers an integrated client portal, eSignature capability, and secure file sharing. There are two editions of SmartVault available: SmartVault for Business and SmartVault for Accountants, with various plans offered in each edition.

SmartVault can be accessed using a variety of devices including a desktop system, web browser, smart phone or tablet. The application includes a PDF Printer that

allows users to easily print any document to PDF, and save them in SmartVault from

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parent folder and a subfolder structure, and users can create and utilize a vault template to expedite the vault setup process.

Users can invite clients to sign up and access the documents in their vault using the client portal or directly from the Connected Desktop. Clients can also upload documents directly to SmartVault when needed. Any folder that is shared in SmartVault will have specific permissions attached, with full access, read, create, write, and delete permissions available. Users can also send folder links to a client via email, though email recipients need to be an authorized user in order to access the folder via the included link.

SmartVault supports a variety of scanners, including all TWAIN compatible scanners, as well as Canon, Ricoh, Hewlett-Packard, and Fujitsu ScanSnap scanners. Multiple documents can be scanned in using a connected scanner, and users can easily create full-text search PDFs by opting to use Optical Recognition (OCR) capability.

The SmartVault Portal can be custom branded as desired. The portal allows access to stored documents from any location, using a variety of devices. Firm admins can invite clients to use the portal, setting the appropriate permissions for each invited client. Documents can also be viewed from the portal, and includes good file search capability. SmartVault provides users with email notification when a document has been uploaded or is available for download. A variety of views are available in the portal, including a default view, a files and folders view, and an advanced view, with users able to choose the view that best suits their needs.

SmartVault encrypts all documents during transit and while stored on the server. The product offers two-factor authentication along with bank level file encryption, with all files stored on servers located in Houston, TX, and mentioned earlier, users can share files via email by converting attachments to secure file links.

SmartVault offers a variety of integration options including complete integration

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and a variety of on-demand trainings are available to choose from. Users can also schedule a QuickStart Training session with SmartVault if desired. Product support is included in the price of the subscription with telephone, email, and chat support available, along with after-hours support, which typically responds in 1-2 business days.

SmartVault offers excellent document storage capability and is suitable for businesses and accounting firms of any size. Two editions of the application are available: SmartVault for Business, which offers a Starter, Team, and Professional plan, and SmartVault for Accountants, which offers Tax Prep and Accounting Pro plans. An Enterprise plan is also available for those with custom requirements. Plans start at \$12.00 per user, per month, and increase to \$40.00 per user per month for the Accounting Pro plan, which includes 500 GB of storage. All plans offer a free, 30-day trial.

2019 Rating – 5 Stars

Firm Management

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