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SmartVault™



SmartVault Document Storage

www.smartvault.com

From the 2020 reviews of Document Storage and Document Management systems.

SmartVault offers complete online document storage, branded client portals, and secure file sharing capability. A good fit for businesses and accounting firms of any size, SmartVault is scalable, with two types of plans: SmartVault for Business, and SmartVault for Accountants. Multiple options are available in each plan. SmartVault also includes a custom plan option for very large and enterprise level organizations.

SmartVault is easily accessible using a variety of devices including desktop computers, browsers, smartphones, and tablets. The application also includes a PDF printer feature that allows users to convert any document to a PDF and then save it in SmartVault.

Accountants will appreciate the Connected Desktop feature that which is where the majority of document management activity takes place. With the Connected Desktop, users are able to upload, download, scan, edit, generate, and send documents for any client. The Connected Desktop is easily navigatable, and it

includes a search bar to locate clients. The client list page provides a complete list of

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custom folder structure for specific clients. A vault template is also available for use, with all vaults in SmartVault using a parent/subfolder structure.

SmartVault includes a version history wherein users can lock an accessed file while all previous versions of the document remain accessible. The brandable client portal allows users to easily exchange documents with clients, and receive email notification when a new file is ready to view on the portal. Firms can add branding details including colors and a logo, and the portal, like the document management system, offers version controls.

In addition, a variety of email templates are available in the application that allow users to distribute documents to multiple clients in a single email. Users can invite any or all clients to access the client portal, and all portal files that are shared also have specific permissions attached, with a variety of permission levels available. There is also an option to share files securely via email, with the ability to convert any attachments to secure file links. The client portal offers a variety of views from which to choose, including a default view, a files view, a folders view, and an advanced view.

SmartVault supports numerous scanners including TWAIN-compatible scanners, Fujitsu ScanSnap scanners, and Cannon Image Formula scanners. SmartVault users can easily scan in multiple documents, and create full-text search of all stored PDFs using the included OCR capability.

SmartVault keeps all documents secure, encrypting documents both during transit and while stored. Two-factor authentication and bank level file encryption are included, with all remote servers located in Houston Texas.

SmartVault offers excellent integration with a wide variety of applications including accounting and tax applications such as QuickBooks Desktop and QuickBooks

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offers live training along with the QuickStart service, which gets new users up and running quickly. Product support is available via telephone, email, or chat, with email support typically responding in 1-2 business days. All support is included in the cost of the application.

SmartVault offers excellent document storage capability and is suitable for businesses and accounting firms of any size. SmartVault offers two editions: SmartVault for Business, and SmartVault for Accountants Three plans are available in the business plan: Starter, Team, and Professional, and two plans are offered in the accountant's plan. Plan prices range between \$12 to \$40 per user, with each plan including an unlimited number of guests. All plans offer a free 30-day trial. There is an Enterprise plan available for larger businesses with pricing available upon request from SmartVault.

2020 Rating – 5 Stars

Strengths:

- Separate plans available for businesses and accountants
- Supports multiple scanners
- Works from any type of device

Potential Limitations:

- Connected Desktop feature only available in Professional plan
- Both Team and Professional plans require a minimum number of users

Firm Management

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