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866-674-6785

www.SmartVault.com

2012 Overall Rating 4.75

Best Fit

Professional firms and also businesses wanting a web-based document management system that includes client portals and integrations with common small business applications.

Strengths

- Integrated Toolbar for QuickBooks
- Customizable firm and client-side branding
- Familiar expandable folder structure
- User-by-user access right customization
- Automated synching to desktop or server folders

- Support for most mobile devices

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With great customization of foldering structures and automated by naming with desktop and server drives, the SmartVault system is probably better described as a web-based firm document management system with the ability to offer portals to securely share and receive files with and from clients. The program is available in various versions, with the Professional Plan priced at \$99 per month (effective January 2012), inclusive of all features.

Firm User Experience 4.75

Client User Experience 4.75

Portal Capabilities 4.75

Technical Aspects 4.75

Help/Support 4.75

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