CPA

Practice **Advisor**

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SmartVault has announced the release of the SmartVault Plug-in for Microsoft Outlook. The new feature allows users to benefit from the ease and convenience of email, along with the integration of SmartVault's secure, compliant solution for managing and sharing documents.

The SmartVault Plug-in creates secure links for sending files and embeds them in email messages, instead of attaching documents to emails. With the plug-in, accounting professionals can use email to share files securely and remain in compliance with federal Internal Revenue Code regulations and state privacy laws. The use of links also makes it easy to share large files without the use of a separate FTP service.

"We are focused on integrations that have a positive, game changing effect on workflow efficiency—and no communication tool is more widely used in business than email," said Eric Pulaski, founder and CEO of SmartVault. "Allowing users to share and manage their documents securely without ever leaving Outlook is transformative, and potentially yields a very high rate of adoption simply because users don't have to learn anything new."

With the SmartVault Plug-in for Microsoft Outlook, users can:

- Upload Email Attachments to SmartVault—With the click of a button, users can upload email attachments to any folder in their SmartVault account. Users can also create new SmartVault folders from within Outlook.
- Send Secure Links to Files and Folders in SmartVault—Safely email confidential documents as easily as attaching a file to your email by clicking the paperclip button. The plug-in inserts a message into your email with a secure link to the documents, rather than attaching the files to the email itself. The recipient clicks

the link and downloads documents instantly—as easy as opening an attachment,

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attachments to secure links in SmartVault.

• Invite and Manage Users—Easily add a new user or grant access to a folder by managing basic user permissions and invitations without leaving Outlook.

"No matter how many tools are out there for sharing files, the majority of us still default to attaching a file to an email—it's easy and convenient. However, if that file contains sensitive information and you send it over the web—you have a potential data security violation," stated Jennifer Katrulya, CPA, Chief Executive Officer of BMRG, LLC. "SmartVault's new plug-in for Outlook not only solves that issue by converting the attachments to secure links, but helps us show our clients that there is a way to use email to send documents to their accountant or professional service provider, that does not expose them to security risks."

The SmartVault Plug-in for Microsoft Outlook was built using the SmartVault Software Developers Kit released in the fall of 2011. The new app is a prime example of how SmartVault's document management and file sharing capabilities can be easily integrated into commonly used productivity applications to create workflows that add real value to the business user.

The SmartVault Plug-in for Microsoft Outlook is free and available to all SmartVault users. To get started, users need a SmartVault account and Microsoft Outlook 2007 or 2010. Those without an account can start a free trial at

www.smartvault.com/signup. For information on downloading, installing, and using the SmartVault Plug-in for Microsoft Outlook, visit the SmartVault website.

Technology

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