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www.smartvault.com

Best Fit: While SmartVault is a good fit for any firm that needs a secure client portal, SmartVault is a best fit for accounting professionals and their clients whose practices involve working with the desktop version of QuickBooks or QuickBooks Online, and would like to streamline workflow, go paperless, and view images of documents linked to transactions.

Strengths

- Secure and stable (99.9% uptime) document storage and file sharing which scales well to small and mid-sized businesses.
- Many file types (PDF, Microsoft Word, Excel, PowerPoint, Outlook E-mail) can be viewed from within a web browser without needing to download and open the file.
- Customizable, firm-branded site (yourfirmname.smartvault.com) in higher end plans which allows users to customize their portal to match their website.
- Strong integration as a document storage system portal with QuickBooks, Results CRM, MethodCRM, SpringAhead, and XpandedReports. Supported by many commercial hosts, including InSynq, Cloud9 Real Time, Ngenx, Right Networks, and Swizznet.
- The product has apps available for iOS and Android, and features add-ins for Outlook, QuickBooks, and QuickBooks Online. SmartVault can also be mapped as a drive to a Windows or Mac computer.

Potential Limitations

- Data is only backed up offsite once a week, so if there was a catastrophic failure, users could lose a few days of work, and the service would be offline for at least 24 hours.

Detailed Observations

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(similar to file cabinets), which are made up of one or more folders, where individual files are stored.

The company's website reports that the service can be operated in compliance with HIPAA as well as PCI (level 1). The data center where the product is hosted includes redundant power, internet, and cooling, and also has a third party SSAE 16 evaluation (SOC 1, Type II). We did not have a copy of this report at the time we went to press.

Mobile applications are available for iOS, Android, and Windows smartphones or tablets and users can map SmartVault as a drive in Windows, MacOS, and other operating systems for uploading and managing files.

The application retains a history of the versions of stored files. The top tier of plans (SmartVault Professional) includes detailed audit and compliance reporting as well as the ability to search the full text of stored files.

Support is provided through a knowledge base, electronic support tickets, e-mail and by telephone. Users with monthly, Individual, or Team plans are provided Basic support, which requires the Company to call back to resolve issues, and has a target time to resolution of one business day.

Partners, Vault-bundle users, annual-pay customers, and those with Professional plans are provided with a premium support telephone number, and there is a targeted time to resolve these issues of one hour. Support is provided from 8:00 AM to 6:00 PM, Monday through Friday, excluding holidays.

As a portal, files stored in SmartVault can be accessed from a variety of sources; through QuickBooks or QuickBooks Online, the Outlook plug-in, a mobile app (iOS or Android), a mapped drive, or using a web browser. Users can share files securely from the portal by sending a link to the file.

SmartVault has a 'view in browser' feature so files can be viewed without having to

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unlimited guest users. And there are no bandwidth charges.

Add-on services are \$10 per month for each additional user, \$5 per month for each 5GB of additional storage, and \$9 per month for each additional QuickBooks Company. Some features require the Team or Professional plans, which are detailed at www.smartvault.com/pricing/

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