Jun. 04, 2013

SmartVault for QuickBooks Online

http://appcenter.intuit.com/smartvault

SmartVault's version for QUickBooks Online users was presented with a 2013 Innovation Award by CPA Practice Advisor during a ceremony in Los Angeles on Monday evening.

SmartVault took its patented Toolbar technology for QuickBooks and extended support to QuickBooks Online, Intuit's cloud-based accounting solution for small business. For the first time, users of QuickBooks Online can now attach and view source documents (such as receipts, bills, and invoices) directly from within QuickBooks Online. SmartVault is the first to deliver this type of "attach and view" document management functionality integrated seamlessly into the QuickBooks Online interface. Currently, QuickBooks Online does not offer this functionality to its users.

QuickBooks Online was Intuit's fastest growing application last year, and they are well positioned to leverage the migration of small business onto cloud and online services. We believe that the combination of an online accounting application with integrated online file storage and sharing is very powerful for a small business and the accounting professionals that service the SMB market – making financial data AND all related source documents accessible at any time and from anywhere within a single, centralized repository. So no matter where else those files are stored, the financial system (THE system of record for the SMB) is the final repository for all financial data and all related source documents.

SmartVault for QuickBooks Online was built using the SmartVault Software

efficiencies created when your documents are no longer stuck in silos (on your desktop, attached to applications, on servers and even some in the cloud). With SmartVault for QuickBooks Online, files are attached and associated with specific transactions in QuickBooks Online, however, those same files are also accessed via any web browser or mobile device. And they can also be accessed by other applications that have integrated with SmartVault (so the files you have attached to your CRM system or your expense management system and stored in SmartVault, are now accessible from QuickBooks Online AND from the web or mobile device). The power of an ecosystem of apps sharing one common document management platform creates significant efficiencies in workflow and also in increased serviceability to clients, as their documents are always accessible.

2. The use of a browser extension to inject the SmartVault Toolbar inside the QuickBooks Online user interface creates a seamless experience for the user to access and manage their files right from within QuickBooks Online. Even the QuickBooks Online product teams at Intuit have been very impressed with the way in which we've chosen to inject the document management functionality inside the user interface, creating a very integrated customer experience for using the application and the feature set. This ties in with SmartVault's overall strategy that document management needs to "slip in" to your workflow, not be something separate that an accountant or a business user has to learn and figure out. So the way we've delivered this functionality is innovative in and of itself.

SmartVault for QuickBooks Online is available to all QuickBooks Online customers as a free trial from the Intuit AppCenter. At the end of the trial, a user will pay just $9/month for unlimited storage of their files.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us