

**CPA**

Practice **Advisor**

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Search capability, and activity log. Email notification is also available, with users ...

**Mary Girsch-Bock** • Oct. 20, 2017



**SmartVault**

**866-674-6785**

[www.smartvault.com](http://www.smartvault.com)

**From the 2017 reviews of Accounting Firm Portals.**

Best suited for firms using QuickBooks or Xero, SmartVault offers bi-directional portal capability that can be easily branded as desired. SmartVault offers easy integration with QuickBooks and QuickBooks Online products, Xero, and Intuit ProSeries and Lacerte. The product also contains excellent document storage and file sharing capability.

SmartVault is available in three versions, with all versions offering document management, custom branding, automatic file check in and check out, full text search capability, and an activity log. Email notification is also available, with users receiving an email when a file has been uploaded or downloaded from the portal.

The product recently added apps for both iPhone and iPad products, so users can

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on the right side of the screen, offering quick access to any related tasks such as Create New Folder, Upload Files, or View Properties. Desktop tools such as the SmartVault Inbox, Scan to Cloud, and SmartVault Drive offers firm users the ability to quickly scan and store documents from any location, as well as manage files to a particular drive if desired.

SmartVault supports Microsoft Office files including Word, Excel, and PowerPoint, Outlook emails, PDF's, and numerous graphic formats. There is no limit on individual file size, though the plan itself places limits on storage capability, with the Accounting Pro plan offering 500GB in storage, and the Enterprise Plan offering unlimited storage capability.

SmartVault offers bi-direction portal capability, so clients can easily share documents with their accountants as needed.

SmartVault allows users to create custom folders, with file access permissions assigned at a group level of an individual level. Users can also assign specific security levels for each client, with firms determining which folders each client will have access to. All clients must be activated by a firm user prior to attempting access to a portal.

The document storage capability offered in SmartVault allows users and authorized clients to have access to any documents or files around the clock. Document search capability is enhanced in SmartVault, with users able to enter a keyword or phrase to search for a specific document.

SmartVault ensures 99.9% uptime, so documents are accessible at any time. All data is hosted at a data center in Houston, TX, with at least two copies of all documents stored offline. The product uses SSL for all shared documents, with all stored documents encrypted for extra security.

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well as short videos with instructions on everything from product setup to performing day to day tasks in the application. A live training hub is available for users that wish to access live training options, and toll-free telephone support as well as chat support is available during regular business hours.

A free 30-day trial is available from the SmartVault website, so those interested can try out the product prior to purchasing. SmartVault currently offers three plans; Tax Prep, designed for tax user only, Accounting Pro, which is the most popular plan offered, as well as an Enterprise level plan, which is designed for firms with a high number of users. Tax Prep currently runs \$30.00 per month, paid annually, or \$37.50 per month billed monthly. Accounting Pro is \$40.00 a month when billed annually, or \$50.00 per month billed monthly. Those interested in the Enterprise plan can contact SmartVault directly for pricing information.

## **2017 Rating 5 Stars**

Firm Management

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