

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

Apr. 10, 2012



SmartVault®

**2012 Innovation Awards Nomination:**

## **SmartVault Plug-In for Microsoft Outlook**

**[www.SmartVault.com](http://www.SmartVault.com)**

In February, 2012 SmartVault launched the SmartVault Plug-in for Microsoft Outlook, allowing for secure, compliant document management and file sharing – right from inside Outlook.

**What It Does:**

For accounting professionals using Microsoft Outlook, they know that their email

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

The new SmartVault Plug-in for Microsoft Outlook gives you the ease and convenience of Outlook, integrated with SmartVault's secure, compliant solution for managing and sharing documents. With the plug-in, you can send, receive, and manage documents securely inside of Outlook, without changing the way you work today.

### **How it Works:**

At SmartVault, security and ease of use is the name of the game – and that's exactly what our new Outlook integration delivers. Here are a few ways accounting professionals can use the SmartVault Plug-in for Microsoft Outlook to increase productivity and streamline the way you interact with your important documents:

- **Upload Email Attachments to SmartVault.** Got an important document in your Outlook inbox, maybe from a client? With the click of a button, you can upload email attachments to any folder in your SmartVault account. You can even create new SmartVault folders, all from within Outlook.
- **Send Secure Links to Files and Folders in SmartVault.** Want to email an important document to a client or colleague? You can browse through your SmartVault folders, select a file to send, and embed a secure link to the file in an email. It's just as easy as attaching files to an email and infinitely more secure.
- **Request Files from a Client or Colleague.** Waiting on an important document from a client or co-worker? Do you need a W-2 or K-1 to process a tax return? Give them a secure path to upload the document to SmartVault, and be automatically notified when the file is ready to view. In this case, you educate your clients about how to share documents with sensitive information securely.
- **Convert Email Attachments to Secure Links.** Want to securely forward an email attachment to another recipient? You can instantly upload and convert attachments to secure links in SmartVault.

- Invite and Manage Users. Need to add a new user, or grant access to a folder? You

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

**713-479-5423**

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved