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SmartVault Corporation — SmartVault

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Best Firm Fit

SmartVault (SV) has established itself as a leading online file storage solution for accounting and tax professionals. If your primary objective is to have a secure, online file sharing solution to exchange files back and forth with your clients, SmartVault will serve you well. The system includes direct integration with QuickBooks as a standard feature and the company is in the process of building integration with an estimated twenty applications during 2012.

Strengths

- Secure online cloud solution with encrypted file transmission and storage
- SmartVault Drive feature lets you map SV as a Windows Explorer drive
- Software Development Kit (SDK) facilitates developing integrations with multiple applications
- You can brand the SmartVault portal with your logo and color scheme

Potential Limitations

- Editing / annotating documents within SmartVault requires the SmartVault Drive,

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- Familiar Windows Explorer folder design provides for a more intuitive interface for organizing files.
- The SmartVault Toolbar provides direct integration inside of QuickBooks to store and view SmartVault files from within QuickBooks. The company is in the process of building this same integration with as many as twenty different applications during 2012 using the new Software Development Kit (SDK.) This feature allows you to utilize SmartVault as a centralized online file storage database.
- Integration with all of your software applications is facilitated through the use of the SmartVault Drive that lets you map your SV folders directly to Windows Explorer. This lets you store and retrieve files from within any application in the same manner that you would store and retrieve local files.
- Outlook integration includes ribbon buttons to send SV files as a link in an email, or to upload attachments and send clients an email with a request to upload files directly to a pre-designated folder.
- You can configure the branding of your SmartVault site to include your company logo, color scheme and custom welcome messages. You can also customize the email notifications settings of file uploads and downloads uniquely for each folder.

Summary & Pricing

SmartVault's motto is to provide a system that is designed to "work the way you work." The SmartVault system can be implemented very quickly and its intuitive interface will help you integrate it into your workflows with minimal training. The secure online storage system provides an effective solution for complying with privacy regulations by keeping your files in encrypted format during transmission and storage. Pricing starts at \$29 per month for a single user plan with 5 GB of

storage and 25 guest users. The Professional version is priced at \$99 per month and

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