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866-674-6785

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

From the [July 2013 Review of Document Storage](#) systems.

**Best Firm Fit:** Accounting professionals and their clients whose practices involve working with the desktop version of QuickBooks or QuickBooks Online, and would like to 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.
- Strong integration as a document storage system portal with QuickBooks, Results CRM, MethodCRM, SpringAhead, Tallie, ACCTivate!, Digieon and XpandedReports. Supported by many top commercial QuickBooks hosting companies.
- The product has apps available for iOS and Android, and features add-ins for Outlook, QuickBooks, and QuickBooks Online. SmartVault is a supported application for four of the largest QuickBooks desktop commercial hosting companies.
- SmartVault can also be mapped as a drive to a Windows computer, and some users report that they maintain an offline copy of their archive using third-party tools like GoodSync.

### Potential Limitations

- SmartVault maintains copies of your documents both in its live datacenter and in

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SmartVault is an interesting hybrid between a portal and a document storage tool. The product is a file storage platform similar to other product reviewed, but includes add-ins and interfaces to Outlook, QuickBooks, and QuickBooks Online so that documents can be categorized and stored in a virtual archive, as well as a branded portal to share files securely.

Data is stored in Vaults (similar to file cabinets), which are made up of one or more folders, where individual files are stored. Special repositories are created for QuickBooks and QuickBooks Online companies so that the linked documents are stored by company, by transaction type within the archive and can be viewed or shared from the application, a browser or mobile device.

Mobile applications are available for iOS, Android, and users can map their SmartVault storage as a drive in Windows, MacOS, and other operating systems. The application retains a history of the versions of stored files.

The top tier of plans (SmartVault Professional) includes detailed audit log reporting as well as the ability to search the full text of stored files. The mobile applications allow users to add a document by taking a picture using the mobile device's camera and providing the indexing data. Data stored in SmartVault can also be accessed on an iPad by other apps using the "Open in" function.

Files stored in SmartVault can be accessed from a web browser, a mobile device (iOS or Android), or right from inside Outlook, QuickBooks or QuickBooks Online. Files can be shared from the portal securely by sending links to documents to users or guests on the account. Granular security permissions can be set on a folder by folder basis to manage who has access to what files and what permissions users have (view only, upload, delete).

There is an excellent guide to getting started with the product, as well as a support

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Support is provided through a knowledge base, electronic support tickets, e-mail and by telephone from SmartVault's Houston, Texas headquarters.

SmartVault is an excellent tool for storing, searching, retrieving, and managing client documents securely from anywhere. While the application has special capabilities with QuickBooks which are not included on any other products in this review, the software is also a good document storage application and client portal for general use by anyone.

### **Summary and Pricing**

Plans start at \$19 per month (\$205/yr) for a single user with three QuickBooks Companies and 5 GB of storage. 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](http://www.smartvault.com/pricing).

### **2013 Ratings:**

**Core Product Functions/Features: 4.25 Stars**

**Integration/Data Export/Import: 5 Stars**

**Advanced Functionality: 4.75 Stars**

## **2013 Overall Rating: 4.75 Stars**

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