

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

accounting firms. SmartVault includes a client portal while offering integration with QuickBooks and QuickBooks Online, and also offers apps that provide integration with other ...

Mary Girsch-Bock • Dec. 18, 2017



SmartVault Document Storage

www.smartvault.com

From the Dec. 2017 Review of Document Management & Storage Systems.

SmartVault Document Storage from SmartVault is a good fit for mid-sized accounting firms. SmartVault includes a client portal while offering integration with QuickBooks and QuickBooks Online, and also offers apps that provide integration with other accounting applications such as Xero and FreshBooks.

SmartVault is a completely online application that can be utilized from a desktop system, a web browser or a mobile device. All files are stored as PDF's, with users able to utilize the SmartVault PDF Printer, which will convert and save any document as a PDF.

SmartVault uses vaults to store all documents. Users can easily create a vault for each

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

documents, and users can easily remove documents from accounts for added convenience, the SmartVault inbox allows managers to easily share documents with others. Users can also use the inbox to upload files from the computer into SmartVault for later processing. SmartVault also offers seamless integration with ScanSnap, creating an easy way to manage QuickBooks documents. The product also offers integration with all TWAIN compliant scanners, including Eastman Kodak, Epson, Hewlett-Packard, and Xerox.

The SmartVault Client Portal allows firms to offer easy access to stored documents, with firms inviting the clients and associates they wish to provide portal access to. Firms can easily brand the portal to reflect the firm's logos, taglines, and colors, and the portal can also be linked directly to the firm website, where clients can simply log in. New in SmartVault, users can view documents in a browser window without having to download the file, and documents can be accessed from any device including smartphones and tablets.

SmartVault offers excellent security, with users able to assign passwords to selected files and documents. Users can also assign file permissions to each file, and can assign a specific level to each file such as read only, write, edit and delete permissions. All documents are encrypted for added protection. For firms that prefer to share files securely via email, the SmartVault Plug-In for Microsoft Outlook can be utilized. The plug-in allows users to securely share documents via email, upload email attachments directly to SmartVault, and convert email attachments to secure links. SmartVault also offers system activity reports so managers can easily view file access details, including file access information.

SmartVault offers excellent integration capability with both QuickBooks and QuickBooks Online. QuickBooks users can enjoy another level of integration by using the integrated Toolbar for QuickBooks. There are also a series of apps available that provide integration with a variety of third-party applications including Intuit

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

SmartVault is an excellent solution for QuickBooks users, along with those using FreshBooks or Xero. Available as an online subscription, a tax prep version is available for \$30 per user, per month. The Accounting Pro version is \$40 per user, per month, and is best suited for small to mid-sized firms. An Enterprise edition of the product is also available with pricing available via custom quote and those interested can access a free 30-day trial, with no credit card required.

2017 Rating – 5 Stars

Firm Management • Technology

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