SmartVault

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www.smartvault.com

From the 2018 reviews of client portal systems for accounting firms.

SmartVault offers online document storage, branded client portals, and secure file sharing capability. SmartVault is best suited for small to mid-sized businesses and accounting firms that use QuickBooks or QuickBooks Online, Xero, or Intuit Lacerte applications.

There are two versions of SmartVault: SmartVault for Business and SmartVault for Accountants. Each version offers various plans that are suitable for small to mid-sized businesses and firms. SmartVault offers a mobile app that works with both iPad and iPhone devices with a third-party app available for other mobile devices such as Android, Windows, and BlackBerry.

Users can customize the SmartVault Portal directly from the user dashboard, with the ability to customize any subdomains, the sign-in page, page header, color scheme, and emails. The dashboard also provides users with quick access to all frequently

used features, with users able to customize the dashboard to suit their needs. The

available include Employees, Manage Folder Templates, Email Templates, and Activity Log.

SmartVault supports multiple file formats including Microsoft Word, Excel, and PowerPoint. The product also supports emails, PDFs, and common graphic and image formats. There are no size limits imposed on files uploaded, but storage space is limited to 500 GB for the Accounting Pro plan, which may affect file sizes. SmartVault users can preview files using the View in Browser option, eliminating the need to open SmartVault. Search options for the portal include search by file name, by file extension, or by using one or more of the words in the document description field. SmartVault's portal is bi-directional, so files can be uploaded, accessed, and downloaded by both firm users and authorized clients. Firm users can send an email to invite clients to sign up for the portal. Once they have signed up, users can create specific security levels for each client to determine what files, folders, and vaults they have access to. The program also notifies users when a file has been uploaded to or downloaded from the portal.

Along with document sharing, SmartVault also serves as a document storage application, so authorized users have access to documents at any time. All SmartVault data is stored on servers located in Houston, TX. All documents stored or shared using SmartVault are encrypted, with backup documents encrypted as well.

SmartVault is a completely integrated application that includes online document storage, secure file sharing, along with the branded client portals. Integration with DocuSign enables firms to obtain authorized electronic signatures from clients via the portal, and the AutoFiler feature routes files to the appropriate client folder. SmartVault also integrates with numerous third-party applications including Tax and Accounting applications such as QuickBooks, QuickBooks Online, Xero, FreshBooks, Intuit ProSeries, and Intuit Lacerte. The product also integrates with Tallie, SpringAhead, Acctivate, Cloud9 Real Time, and Right Networks.

SmartVault offers an excellent selection of tools and resources for product users

for the free trial from the SmartVault website. Available for both businesses and accounting firms, SmartVault's Accountants version offers Tax Prep Only or Accounting Pro for full service firms, with the Pro version running $40 per user per month, which also includes 500 GB of storage and unlimited guests. For larger firms, an Enterprise Plan is available, with pricing available upon request.

2018 Rating 5 Stars

Accounting

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