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accounting firms. SmartVault is particularly well suited for firms using QuickBooks...

Mary Girsch-Bock • Oct. 18, 2019



**SmartVault**

**866-674-6785**

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

**From the 2019 reviews of client portal systems for accounting firms.**

SmartVault offers branded client portals, along with online document storage and secure file sharing capability. Best suited for small to mid-sized businesses and accounting firms. SmartVault is particularly well suited for firms using QuickBooks Desktop, QuickBooks Online, Xero, or Lacerte applications.

SmartVault offers two versions: SmartVault for Business and SmartVault for Accountants, with all plans offering unlimited guests, secure file sharing, a branded client portal, online document storage, complete product support, and an Outlook Plugin. A native mobile app is also available for iOS devices, though Android, Windows, and Blackberry mobile users will have to use a third-party app to connect to SmartVault.

The online document storage feature works in conjunction with the client portal to

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[Click here to sign up for portal access.](#)

Users can share folders with specified users, both within the firm and with outside users such as clients. A potential user must be granted permission to access the folder in order to be able to view or download a folder. Permissions that can be granted include Full Access, Read, Write, Create, and Delete, with the ability to grant the same level of permissions for all clients, or create custom permission levels for each client. Once a file has been uploaded to the shared client folder, you can choose to send an email to the client with a link to either the folder or the document that has been recently uploaded.

SmartVault supports a variety of file formats including Microsoft Office files such as Word, Excel, and PowerPoint. Emails, PDFs, and graphic and image formats are also supported in the application as well. There are no size restrictions on files uploaded or shared in SmartVault, but storage space is limited to 500 GB in the Accounting Pro plan, which can affect the size of the files stored. Users and clients both can preview documents using the View in Browser option without opening SmartVault, and users can drag and drop documents directly to the client portal if desired. The client portal is bi-directional, so authorized users with the appropriate permissions can easily upload documents to the portal.

SmartVault logs all system activity with a timestamp, with a report available for review. A version history is also available, with users able to access previously deleted or overwritten files through the version control feature. All SmartVault data is stored on servers in Houston, TX, with files encrypted at all times.

Along with client portals, SmartVault also includes online document storage and secure file sharing capability. The product offers excellent integration options with a number of third-party tax and accounting applications including QuickBooks, QuickBooks Online, Xero, FreshBooks, Intuit ProSeries, and Intuit Lacerte.

SmartVault also integrates with DocuSign which allows users to obtain electronic

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includes one-on-one training with a product specialist. Toll free telephone support is available during regular business hours, and both email and chat support is available as well.

SmartVault offers two product editions: SmartVault for Business, designed for businesses of any size along with SmartVault for Accountants, which offers a Tax Prep plan for tax only and the Accounting Pro plan, which currently runs \$40.00 per user, per month and includes 500 GB of storage and an unlimited number of guests. An Enterprise Plan is also available for very large firms with custom needs or a large number of users. For those interested, SmartVault offers a free 30-day trial for any of their plans.

## **2019 Rating: 5 Stars**

Firm Management

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