SmartVault™

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www.smartvault.com

From the 2020 reviews of client portals for accounting firms.

SmartVault is a file-sharing and document management system designed for accounting firms and their clients. The system is geared toward firms of 5-to-50 staff, supporting the transfer of all file types, with a focus on accounting, tax and payroll documents. The system integrates with QuickBooks, Xero and Lacerte.

SmartVault's portal options are designed for a variety of industries, including accounting firms, financial services firms, retail businesses, industrial and manufacturing, and construction entities. The portals can be linked to from firm websites, and are accessed via a traditional browser, with firms being able to create any number of customized and firm-branded portals for clients. An app is also available for Android and iOS devices.

The firm-side view of the SmartVault Dashboard offers a client list, with functions for searching, ending files to clients, creating client engagements, accessing internal documents or public documents folders, and folder and email templates.

Clients can easily upload tax documents, accounting data or other information using drag-and-drop. Firm users can then view or download those files, or upload files for

client use, such as tax returns or financials. Clients and firm users can be alerted via

SmartVault can be used to share and store Word, Excel, PowerPoint, CSV, emails, PDFs, and image files. The system includes e-signature capabilities via DocuSign. There are no size restrictions on individual files uploaded or shared in SmartVault, but the Starter and Accounting Pro plans have an overall storage limit of 500 GB. Other versions have no limit.

SmartVault integrates with several third-party tax and accounting applications including QuickBooks, QuickBooks Online, TaxCalc, Xero, FreshBooks, Drake, UltraTax, CCH, Intuit ProSeries and Lacerte, Salesforce, Method CRM, Results CRM and several hosting providers. SmartVault also integrates with DocuSign for e-signatures.

Help and support functions are available via the SmartVault Resource Center, which has a searchable knowledgebase, how-to articles, self-help guides, webinars, ebooks and white papers. Various training options are also offered. Phone, chat and email support is available during regular business hours.

SmartVault is available in four versions: Starter, for small teams or micro businesses, which is $16 per user per month; Professional, for external collaboration and advanced audit needs, which is $20 per user per month; and Enterprise, which includes advanced customization, integration, and workflow, and which is priced on a custom basis. An Accounting Pro plan is also offered, designed for tax, accounting, and full services firms, which is $40 per user per month.

2020 Rating: 4.5 Stars

Firm Management

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