

Frequently Asked Questions: What to Expect From Your SmartVault Partnership

Ready to make the switch to SmartVault but still have some last-minute questions? You're not alone! Below is a list of frequently asked questions we've been asked by users right before they made the switch. Don't see your question below? Reach out to one of [our document management experts](#) today with any additional questions you may have!

Features

What features will I have access to as a SmartVault customer?

All SmartVault users can utilize secure file sharing, unlimited storage, unlimited collaborators, a secure client portal, custom branding, and mapped drive. Depending on the plan you choose, additional features may be available to you. Visit our [Pricing & Plans page](#) to see the complete feature list for each plan.

What software solutions integrate with SmartVault?

Popular integrations include Microsoft Outlook, DocuSign, and more. Visit our [integrations page here](#) to view the complete list.

How often does your team make updates to the software?

SmartVault constantly strives to evolve and keep up with your needs as a business owner. We've released new features such as RequestDocs, DocuSign as a Subscription, Email Capture, Archive Clients, and more in the past year! Visit our ["What's New, What's Coming"](#) page to stay updated on new feature releases.



How will I know when a new feature is released?

The SmartVault team makes it extremely easy to access this information. Current SmartVault users can learn about new feature releases via the following methods:

- [What's New, What's Coming Page](#)
- Quarterly Product Roadmap Webinar
- The Monthly SmartTalk Newsletter
- [LinkedIn](#), [Facebook](#), and [Twitter](#)

What if I have an idea for product enhancements or new features?

We love receiving feedback and ideas from our users! As a SmartVault customer, you have the opportunity to choose the next exciting feature we release. You can send your suggestions to features@smartvault.com or vote on your favorite ideas in our [ideas portal](#). If you're lucky, we may even choose you to beta test features before they are released so that we can review your feedback and make updates as necessary!

Am I able to trial SmartVault before purchasing?

Absolutely! You can try any of our plans to ensure SmartVault is a fit for you. Sign up for your free trial on our [Pricing & Plans page](#).

Support

If I need support while using SmartVault, how do I contact your customer support team?

You can reach our support team via the [SmartVault help center](#), [email](#), [chat](#), or phone (US: 888-607-4275 / UK: 01223-735906).

Do you charge for tech support?

There's no charge for tech support. Our Customer Support team is available by chat, phone, and email. Visit our [Support Center](#) to learn more and get help.

How often is your support team available?

Our chat and email lines are open 24/7. Support cases sent via email or web can expect a response within 1-2 business days. US phone lines are open Monday through Friday, 3 am - 5 pm CST, as well as Saturdays, 9 am-5 pm CST during tax season (closed 12-1 for lunch). UK phone lines are open Monday through Friday, 9 am - 5 pm GM.

Where can I find additional resources outside of the support team?

The [SmartVault Help Center](#) offers a variety of support articles for all plans and the various feature sets. Users can also access [release notes](#), [the online learning portal](#), and a list of upcoming [live and on-demand webinars](#), all designed to guide you through the SmartVault software.

Training

Do you provide training?

SmartVault provides options for all-size firms to receive training on the SmartVault system. You can join our free group training if you are on a trial or a paid account. We also offer Full-Service Onboarding and Migration Services.

Do you have any videos I can watch?

Yes! We offer a variety of live and on-demand webinars to walk you through the software. Visit our [Webinar Library](#) in our Help Center to see the complete list!

Are there any other training resources I should know about?

Yes, there are! Users can sign up to learn more about SmartVault in SmartVault Academy. This self-paced learning and onboarding platform was built to help you make the most of your SmartVault software. Learn more about SmartVault Academy and enroll [here](#).



Built with bank-level security, SmartVault offers a cloud-based document management system and client portal designed to help you reduce costs, raise productivity and employee happiness, stay in compliance, and deliver higher levels of service.

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