

# SmartVault vs. FileCabinet CS<sup>®</sup>

SmartVault offers a comprehensive, cloud-based document management and client portal platform that outperforms FileCabinet CS in nearly every aspect.

	SmartVault	FileCabinet CS
<b>Client Management (Engagement and Onboarding)</b>		
Client Intake Forms and Templates	✓	✗
Engagement Letters with eSignature	✓*	✓
Proposals and Quotes	✓	✓
Automated Folder Structure and User Permission Creation	✓	✗
Unlimited Clients	✓	✗
Custom List to Request Source Documents	✓	✗
Source Docs Automatically Route to Correct Folder	✓	✗
Robust Dashboard to View Status and Send Reminders	✓	✗
Automatic Notifications Keep Everyone Updated	✓	✗
<b>Document Management &amp; Security</b>		
Cloud-Based 24/7 Access	✓	✗
Unlimited Cloud Storage	✓	✗
Customizable Folder Structures	✓	✗
Ability to Link (group) Multiple Clients	✓	✓
Docs Available Online and on Desktop	✓	✗
PDF to Print Functionality	✓	✓
Auto-Routing/Saving	✓	✗
Document Locking	✓	✗
Version Control & Document History	✓	✓
Advanced Search Functionality	✓	✓
OCR for Scanned Documents	✓	✓
Document Data Extraction	✓	✗
Integration with Multiple Tax Prep Systems	✓	✗
Seasonal Worker Licenses	✓	✓

\*through an integration



## SmartVault vs. FileCabinet CS

	SmartVault	FileCabinet CS
<b>Client Portal &amp; Collaboration</b>		
Included Custom Client Portal	✓	✗
Add Link to Portal on Website	✓	✓
Secure File Sharing	✓	✓
Real-Time Staff Collaboration	✓	✗
Multi-Channel Client Communication	✓*	✗
eSignature Workflow (incl. 8878/8879)	✓*	✓
Unlimited Guest Users	✓	✗
Configurable Notifications	✓	✗
Send Password-Protected Files Via Email	✓	✗
Integrated Payment Collection	✓*	✗
<b>Platform Reliability &amp; Compliance</b>		
Mobile Access	✓	✗
Reliable (~100% Uptime)	✓	✗
SOC 2 Compliant	✓	✓
FINRA, SEC, GLBA Compliant	✓	✓
Specialized for Accounting	✓	✓
Backup and Recovery	✓	✗
Activity Tracking and Audit Logs	✓	✗

\*through an integration

## SmartVault Advantages

- ▶ Combine two systems in one with an included cloud-based, custom client portal.
- ▶ Grow with unlimited storage, clients, users, eSignatures, KBAs, forms, and proposals.
- ▶ Collaborate in real-time with multi-channel communication and 24/7 mobile access.
- ▶ Automate workflows with smart folder structures, eSignatures, and auto-routing.
- ▶ Secure data with bank-grade security, audit trails, and automatic backups.
- ▶ Achieve goals faster with custom onboarding, training, and US-based support.

## Streamline Your End-to-End Tax Preparation Workflow

### Onboarding Clients



Firm

- SmartVault automatically creates the folder structure and user permissions when you add a client.
- Create any document, form, or source doc list and send to client via a link in text, email, or webpage.



Client

- Complete request (review, fill out form, eSign, upload docs, etc.).
- Submitted/signed docs are auto-saved and firm is notified.

### Sharing & Storing Returns



Firm

- Complete tax return in UltraTax and print to SmartVault. SmartVault auto-routes the return to the correct folder.
- Send tax return to the client(s); request approval, eSignature, and payment.



Client

- Review, eSign (completing KBA), and pay invoice from anywhere, on any device.
- Signed doc is auto-saved in the client's folder and firm is notified.

- + Learn more
- + Try for free
- + Schedule a demo

visit [smartvault.com](https://smartvault.com)