

Head to Head Comparison:  
**SmartVault vs. FileCabinet CS®**

# Is Your Firm Stuck in the Past or Future-Ready?



## **Stuck**

Archaic tools and frustrating processes hinder your growth.

## **Future-Ready**

Modern tools support your growth and scale with you  
- now *and in the future.*



# “I want to be stuck,” said no one ever

If your goal is to keep your accounting practice stuck in neutral, FileCabinet CS is the perfect solution for you. They’re not even updating it anymore! But if you want to run a modern, profitable firm, SmartVault’s the clear choice.

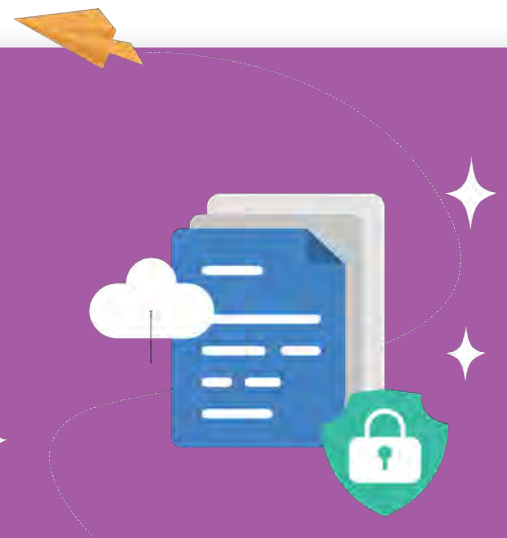
	SmartVault	FileCabinet CS
<b>Document Storage</b>	✓ Unlimited cloud storage	✗ Limited to 100GB
<b>Client Capacity</b>	✓ Unlimited clients	✗ Limited to 5 clients
<b>Client Portal</b>	✓ Included with custom branding	✗ Not included
<b>Accessibility</b>	✓ Cloud-based 24/7 access with mobile support	✗ No cloud or mobile access
<b>Tax System Integration</b>	✓ Integrates with multiple tax prep systems	✗ Limited integration
<b>Payment Processing</b>	✓ Accept payments*	✗ No payment processing
<b>Collaboration Tools</b>	✓ Real-time collaboration features	✗ Limited collaboration
<b>eSignature Workflows</b>	✓ End-to-end eSignature capabilities	✓ Basic eSignature support
<b>Document Organization</b>	✓ Automated folder structure and permissions	✗ Manual setup required
<b>Client Communication</b>	✓ Multi-channel (SMS, email, mobile, etc.)*	✗ Limited channels
<b>Customization</b>	✓ Custom templates for organizers, questionnaires	✗ Limited customization
<b>Security Compliance</b>	✓ FINRA, SEC, GLBA, SOC 2, KBA compliant	✓ Basic compliance

\*through an integration

A more thorough comparison starts on page 3!

## Have UltraTax CS? SmartVault Integrates Seamlessly

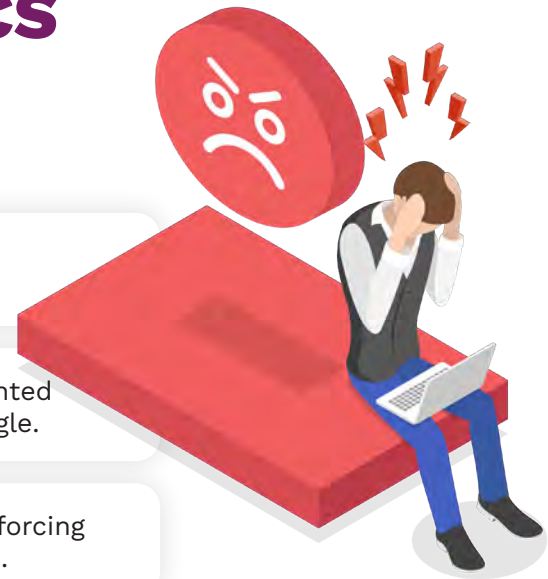
Our integration automatically routes and organizes files from UltraTax CS to SmartVault, freeing you from the hassle of doing it yourself. This saves you time, reduces human error, and makes it easier for your team to quickly find the documents they need.



[Learn more](#)

# Hidden costs of FileCabinet CS

It's costing you money, opportunities, and time that you can't afford to lose.



Limited storage and client capacity put a cap on your potential, forcing you to reject business or juggle systems as you grow.



Lack of integrations and mobile access create an inefficient, disjointed experience for your team and clients, making collaboration a struggle.



The outdated, unsupported platform leaves you stuck in the past, forcing you to work with archaic tools that frustrate your team and clients.



Basic security and compliance features struggle to keep data safe, making your firm a sitting duck for cybercriminals looking for easy targets.

# Come out on top with SmartVault

SmartVault is designed to help you streamline operations, enhance compliance, and scale to your fullest potential.



Unlimited cloud storage and client capacity (and more!) allow your practice to scale as you take on new business.



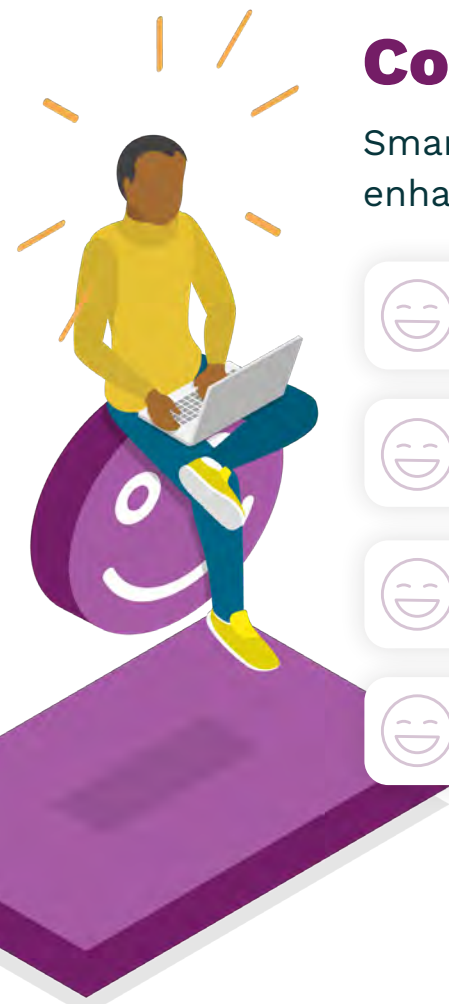
Client portal, 24/7 mobile access, robust integrations, and powerful tools create a seamless, collaborative experience for all.



15+ years of accounting focus, heavy investment in our software, and over 3 million users prove we deliver reliable, modern software.



Bank-grade security and compliance support give peace of mind and help you focus on what matters most: growing your practice and serving clients.



# Deep Dive: SmartVault vs. FileCabinet CS

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)