Plans Built for ProConnect Tax Pros

SmartVault

Get secure document management, a built-in client portal, and automated workflows—fully integrated inside ProConnect.

Choose the plan that fits your firm's size, goals, and growth path.

	ProConnect Docs	Accounting Pro	Accounting Unlimited
	Best for solo preparers or small firms	Best for mid-sized or growing firms	Best for multi-preparer or large firms
	$65/month 1 user only (billed annually)	**$55**/user/month 2 user min. (billed annually)	**$75**/user/month 2 user min. (billed annually)
Included in All Plans			
Unlimited cloud-based storage	✓	✓	✓
Unlimited clients, external collaborators, and users	✓	✓	✓
Custom branded client portal	✓	✓	✓
Request, track, and collect client documents	✓	✓	✓
Password-protected file sharing	✓	✓	✓
Mobile-enabled access	✓	✓	✓
File versioning	Unlimited	Unlimited	Unlimited
Email capture	✓	✓	✓
Full text search	✓	✓	✓
Connected Desktop App	✓	✓	✓
Activity logs	✓	✓	✓
User permission controls	✓	✓	✓
Centralized document repository	✓	✓	✓
Accounting/Tax Prep Integrations			
Intuit ProConnect	✓	✓	✓
Intuit Lacerte and ProSeries	✗	✓	✓
Intuit Quickbooks Online & Desktop	✓	✓	✓
Tax Prep Outside of Intuit Ecoystem	✗	✓	✓
Open API	✓	✓	✓
DocuSign	✓	✓	✓
Liscio, FinancialCents, LedgerSync, GruntWorx, ++	✗	✓	✓
Security & Compliance			
SOC 2 Type 2 compliant	✓	✓	✓
IRS 4557 & FTC Safeguards compliance	✓	✓	✓
Two-factor authentication	✓	✓	✓
Password-protected PDFs	✓	✓	✓
Ability to archive clients	✓	✓	✓
Audit logs & access controls	✓	✓	✓
Compliance Vault (WISP Templates)	✗	✗	✓

	ProConnect Docs	Accounting Pro	Accounting Unlimited
Workflow Efficiency & Automation			
SmartRouting of documents	✗	✓	✓
Customized folder templates	✓	✓	✓
Bulk print organizers & returns	✓	✓	✓
Customizable Doc Requests List	✗	✓	✓
Print driver / Autofiler	✓	✓	✓
Assign clients to employees	✗	✓	✓
Custom permission groups	✓	✓	✓
Email templates	✓	✓	✓
Email notifications	✓	✓	✓
Tax specific templates	✓	✓	✓
PDF printer	✓	✓	✓
PDF editing	✓	✓	✓
PDF form filler	✗	Add-on	Unlimited
Send quotes & proposals	✗	Add-on	Unlimited
Mapped drive access	✓	✓	✓
Connected Desktop App	✓	✓	✓
Seasonal licenses	✗	Add-on	Add-on
Audit logs & access controls	✓	✓	✓
Automatic file lock	✓	✓	✓
SmartScan	✓	✓	✓
SmartRequestAI (coming Q4 2025)	✗	✓	✓
eSignatures & Payments			
Request & send eSignatures	Add-on	Add-on	Unlimited
KBAs / ID verification	Add-on	Add-on	Unlimited
Secure payment processing	✓	✓	✓
Sign on mobile devices	✓	✓	✓
Reusable templates for forms & documents	✗	✓	✓
Pin code authentication for digital signature	✓	✓	✓
Certified Vault	Add-on	Add-on	Add-on
Onboarding & Support			
U.S. based phone, email & chat support	✓	✓	✓
On-demand training portal	✓	✓	✓
One-on-one team training	Add-on	Add-on	Add-on
Data migration services	Add-on	Add-on	Add-on

SmartVault is Intuit's exclusive integrated document management system for Lacerte, ProSeries, and ProConnect, providing a secure, modern platform to manage end-to-end tax prep workflows across the Intuit ecosystem.

Learn more: SmartVault.com/Intuit