Business Pro Plan for Financial Institutions
Everything you need for efficient workflows and advanced security.

SmartVault

Key Features	Availability
Unlimited Cloud-Based Document Storage	Y
Unlimited Customers & External Collaborators	Y
Secure File Sharing	Y
Branded Customer Portal	Y
Audit Reporting & Activity Logs	Y
User Permission Controls	Y
Minimum Users	2 Users
Maximum Users	Unlimited

Security, Compliance, & Governance	Availability
Two-Factor Authentication	Y
Send Password Protected PDFs	Y
Encrypted email	Y
Archiving	Y
FINRA, SEC, GLBA Compliance	Y
GDPR, AML Compliance	Y
HIPAA Compliance	Y
UCC 9-105 Compliance with Certified Vault	Add-on
AWS (Amazon Web Services) Hosted Data	Y

Over 3 million people securely gather, store, share, and eSign documents in the cloud with SmartVault.

Bank-grade security keeps data safe and helps you comply with regulations.

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Workflow & Collaboration Management	Availability
Connected Desktop App	Y
Request Customer Documents	Y
Activity Logs	Y
Audit Reporting	Y
File Versioning	**Unlimited**
Automatic File Lock	Y
Email Capture	Y
PDF Editing	Y
Full Text Search	Y
Workflow/Status Tracking Dashboard	Y
PDF Form Filler	**Add-on**
Send Quotes & Proposals	**Add-on**

Workflow & Collaboration Management	Availability
Mapped Drive	Y
Email Notifications	Y
User Permission Controls	Y
Mobile Enabled	Y
PDF Printer	Y
File check-in and check-out	Y
Branded Customer Portal	Y

Connected Desktop: Get lightning-fast access to your documents in the cloud with the speed and performance of a desktop app.

PDF Form Filler: Easily create professional, branded PDF files for your customers to fill directly in SmartVault.

Send Quotes & Proposals: Create, manage, approve, and record business proposals, sales documents, or pricing quotes.

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SmartVault eSignature	Availability
Request & Send eSignatures	**Add-on**
ID Verification/Knowledge Based Authentication (KBA)	**Add-on**
Secure Payment Processing	Y
Sign On Mobile Devices	Y
Reusable Templates for Forms & Documents	Y
Pin Code Authentication for Digital Signature	Y
Securely sign, create, store, and manage the authoritative copies of your digital assets with CertifiedVault	**Add-on**

Customizations	Availability
Customized Folder Templates	Y
Allocate Customers to Individual Team Members	Y
Print Driver/Autofiler	Y
Email Templates	Y
Custom Permission Groups	Y

Onboarding & Support	Availability
U.S. Based Support	Y
On-Demand SmartVault Training Portal	Y
One-on-One Training for Individuals & Teams	**Add-on**
Data Migration Services	**Add-on**

Integrations	Availability
Open API (Contact us for more information)	Y

Convienent, Compliant eSignatures: Enable customers to upload, review, and eSign docs from wherever they're located, all securely inside SmartVault's client portal.