

DOCUMENT
MANAGEMENT

WHO'S WHO

AMONG THOSE SERVING THE TAX & ACCOUNTING PROFESSION



Learn more about
SmartVault at
www.cpdata.com/whoswho/SmartVault



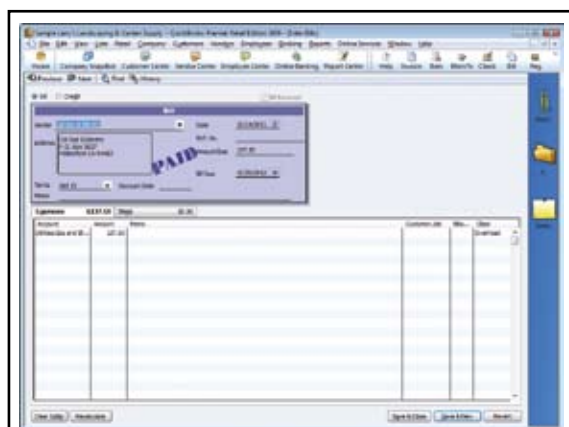
COMPANY OVERVIEW

SmartVault™ is a leading provider of easy-to-use and affordable document management solutions that enable QuickBooks® users to go paperless in minutes. SmartVault offers many of the features of a conventional document management system, but in a package with a substantially reduced learning curve, virtually no startup costs and tight integration with QuickBooks. SmartVault's integration with QuickBooks via a simple patent-pending toolbar interface is one of the most distinct competitive differentiators. The usability of the toolbar creates a seamless user experience for scanning, attaching and finding documents within a familiar application.

Unlike other document management offerings that built their core businesses around document management, then figured out how to 'plug in' to applications, SmartVault designed its document management solution specifically for QuickBooks, optimizing the integration. In addition, as a Software-as-a-Service (SaaS) solution, there is no hardware to install; no need to configure server software and updates; and new features are released frequently and are automatically provisioned.

MARKETS SERVED

SmartVault is an ideal solution for QuickBooks users and accounting professionals engaged in client interactions. SmartVault also has a robust referral network designed for QuickBooks ProAdvisors, accounting consultants and trainers.



The SmartVault toolbar transforms QuickBooks into a simple document management system.

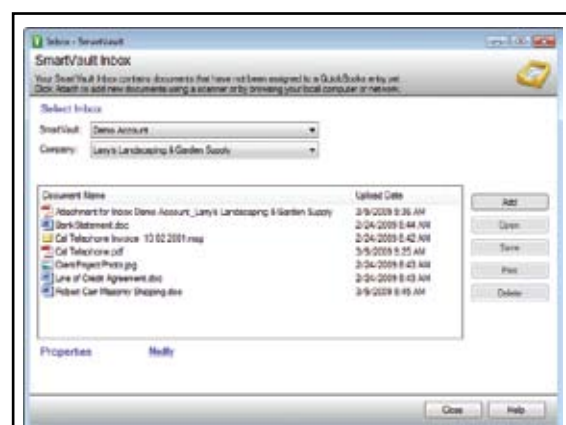
PRODUCT

SmartVault provides an affordable, easy-to-use web-based service that enables users to securely store and share QuickBooks company files and scanned paper documents. Additional benefits of using SmartVault include:

- **Go paperless without changing the way you or your clients work.** SmartVault instantly transforms QuickBooks into a simple and secure document management system—without the expense and hassle of learning a more complex tool. Accountants and their clients will save time and money by simply uploading documents as they arrive, making them instantly available.
- **Replace snail mail, faxes and shoeboxes.** Even if they don't have QuickBooks installed, clients can scan documents directly to the SmartVault Inbox for processing by their accountant or bookkeeper. For clients, this improves collaboration, saving time and money while accountants benefit by getting instant access to documents in a more organized and timely manner.
- **Be more prepared for audits.** By storing backup documentation directly with their accounting records, clients can easily provide the appropriate materials in case of an audit, reducing business downtime. Your clients can rest assured that essential documents are just a click away, instead of buried in a filing cabinet.
- **Reduce fraud by strengthening internal controls.** Help your clients take control by scanning original images of bank records, checks, payroll, invoices, and other key documents and then attaching them directly to their relevant transactions. By regularly reviewing transactions and the corresponding source documents, your clients can strengthen internal controls, helping to identify and reduce the risk of fraud.
- **Give your clients peace of mind.** Your client's documents are stored in a secure, fully



Scan and attach documents directly to QuickBooks entries to streamline document management.



The SmartVault Inbox gives non QuickBooks-users the ability to scan and queue documents for later processing.

redundant SAS 70 Type II compliant hosting facility. For an extra layer of protection, SmartVault can also backup and safeguard their QuickBooks company files.

CUSTOMER SUPPORT

Customers can access a robust knowledge-base and FAQs online at the SmartVault Support Center, <https://support.smartvault.com>. Support is also available via email or by calling toll-free 1-866-674-6785 (in North America) or 1-713-589-6388 outside North America.

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