

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
Client Management (Engagement and Onboarding)		~
Client Intake Forms and Templates	×	~
Engagement Letters with eSignature	*	
Proposals and Quotes		
Automated Folder Structure and User Permission Creation	V	×
Inlimited Clients	\checkmark	×
Custom List to Request Source Documents	\checkmark	×
Source Docs Automatically Route to Correct Folder	 Image: A second s	×
Robust Dashboard to View Status and Send Reminders	 Image: A second s	×
Automatic Notifications Keep Everyone Updated	 Image: A set of the set of the	×
Document Management & Security		
Cloud-Based 24/7 Access	 Image: A second s	×
Jnlimited Cloud Storage	 Image: A second s	×
Customizable Folder Structures	\checkmark	×
Ability to Link (group) Multiple Clients	 Image: A second s	 Image: A set of the set of the
Docs Available Online and on Desktop	 Image: A second s	X
PDF to Print Functionality	~	~
Auto-Routing/Saving	v	×
Document Locking	v	×
/ersion Control & Document History	v	 Image: A second s
dvanced Search Functionality	V	 Image: A second s
OCR for Scanned Documents	 Image: A second s	 Image: A second s
Document Data Extraction	 Image: A second s	×
ntegration with Multiple Tax Prep Systems	V	×
Seasonal Worker Licenses	 Image: A second s	 Image: A second s

*through an integration

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Client Portal & Collaboration	•	
Included Custom Client Portal		×
Add Link to Portal on Website	\checkmark	\checkmark
Secure File Sharing	\checkmark	 Image: A second s
Real-Time Staff Collaboration	\checkmark	×
Multi-Channel Client Communication	*	×
eSignature Workflow (incl. 8878/8879)	*	 Image: A set of the set of the
Unlimited Guest Users	v	×
Configurable Notifications	~	×
Send Password-Protected Files Via Email	 Image: A second s	X
Integrated Payment Collection	*	×
Platform Reliability & Compliance		
Mobile Access	\checkmark	×
Reliable (~100% Uptime)	 Image: A set of the set of the	×
SOC 2 Compliant	~	v
FINRA, SEC, GLBA Compliant	~	v
Specialized for Accounting	v	 Image: A second s
Backup and Recovery	~	×
Activity Tracking and Audit Logs	~	X

SmartVault

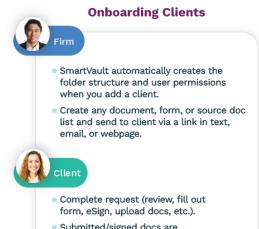
FileCabinet CS

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.

*through an integration

Streamline Your End-to-End Tax Preparation Workflow



 Submitted/signed docs are auto-saved and firm is notified.

oc 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. • 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

