

# SmartVault vs. Onvio®



Clunky, slow, frequently down, and zero support – just a few complaints Onvio users mention in reviews. SmartVault offers a stark contrast: a reliable, user-friendly platform backed by a responsive customer care team.

## The Hidden Costs of Using Onvio

- ✗ **Unreliable Performance and Frequent Downtime:**  
Slow loading times, outages, and sync issues between modules lead to costly workflow disruptions and frustration across teams and clients.
- ✗ **Steep Learning Curve and Poor User Experience:**  
An unintuitive interface, limited customization options, and compatibility problems result in decreased productivity and increased training costs.
- ✗ **Inadequate Support and Feature Limitations:**  
Long wait times for customer support, unresolved technical issues, and a lack of key features leave many firms feeling unsupported and ill-equipped to serve their clients.

## The Advantages of Using SmartVault

- ✔ **Proven Reliability and Performance:**  
With 99.999% uptime, fast document retrieval, and seamless integration with leading tax prep apps, SmartVault ensures your firm operates without interruption, maximizing billable hours and client satisfaction.
- ✔ **Intuitive Interface and Rapid Adoption:**  
An easy-to-navigate platform with customizable workflows and personalized training allows your team to focus on serving clients rather than wrestling with software.
- ✔ **Comprehensive Support and Continuous Innovation:**  
Responsive customer support, regular feature updates based on user feedback, and a rich set of accounting-specific tools make SmartVault a partner in your firm's success.

### 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 about the integration.](#)

## Streamline Your End-to-End Tax Preparation Workflow



### Add Unlimited Clients

Say goodbye to duplicate data entry and account configuration. SmartVault auto-creates client profiles, security permissions, users, and folder structures.



### Engage and Onboard

Create any document, form, quote, and request list. Clients can review, submit source docs, and eSign from anywhere, on any device. All documents are automatically saved to the correct folder.



### Auto-Route Returns

Print and auto-route tax returns directly into the correct SmartVault client folder by tax year. This automation saves you time, eliminates human error, and makes managing large volumes of returns easier.



### Accelerate Reviews

Send clients their returns through the portal, enabling them to review, approve, and eSign (with knowledge-based authentication) 100% online. Monitor the status of tax returns, organizers, and client interactions through an intuitive dashboard.

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	SmartVault	Onvio
<b>Platform &amp; Storage</b>		
Consistent Uptime	✓	✗
Unlimited Clients	✓	✗
Unlimited Storage	✓	✗
Unlimited Guest Users	✓	✗
Mobile Access	✓	✓
Comprehensive Training and Support	✓	✗
<b>Client Engagement</b>		
Client Intake Form	✓	✓
Pricing Engine	✓	✗
Custom Proposals & Quotes	✓	✗
Engagement Letters w/ eSignature	✓	✓
Accept Payment	✓	✗
<b>Client Onboarding</b>		
Automated Folder Structure Creation	✓	✓
Customizable Client Organizer	✓	✓
Document Management	✓	✓
Secure Document Collection	✓	✓
Cloud-Based 24/7 Access	✓	✓
OCR of Scanned Documents	✓	✓
Integration with UltraTax CS	✓	✓
Version Control/History	✓	✓
<b>Client Portal</b>		
Custom Branded Portal	✓	✓
Portal included in DMS Price	✓	✗
Portal Enables Real-Time Collaboration	✓	✗
Integrated eSignature Workflows	✓	✓
Seasonal Workers Licenses	✓	✗
<b>Security &amp; Compliance</b>		
SOC 2 Type 2 Compliant	✓	✓
Supports Industry-Leading Regulations	✓	✓

## Real Results: A Case Study

When Kristie Agar of O'Connor and Agar CPA opened her firm, she was determined to find solutions that could streamline operations and provide a better client experience after years of struggling with Onvio. SmartVault delivered immediate results:

- Achieved a completely paperless workflow
- Simplified signature processes with unlimited eSignatures
- Enhanced client connectivity through an easy-to-use portal
- Streamlined document management and tax return handling
- Reduced training time for seasonal staff

“We don’t waste time hunting documents across different programs, as everything is organized right in SmartVault,” Kristie explained. This efficiency and organization are why she enthusiastically recommends SmartVault to her peers.

SmartVault: Built for Accounting Pros, Designed for Growth. [Schedule a demo today!](#)

[Visit SmartVault.com](https://www.smartvault.com)