

Business Pro Plan

Everything you need for efficient workflows and advanced security.

Key Features		Availability	Security, Compliance, & Governance		Availability
Unlimited Cloud-Based Document Storage		Y	Two-Factor Authentication		Y
Unlimited Customers & External Collaborators		Y	Send Password Protected PDFs		Y
Secure File Sharing		Y	Encrypted email		Y
Branded Customer Portal		Y	Archiving		Y
Audit Reporting & Activity Logs		Y	FINRA, SEC, GLBA Compliance		Y
User Permission Controls		Y	GDPR, AML Compliance		Y
Minimum Users		2 Users	HIPAA Compliance		Y
Maximum Users		Unlimited	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.

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.

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

