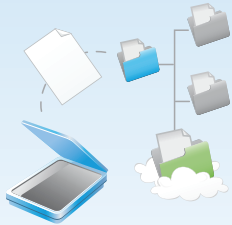


## Streamline Client Bookkeeping and Enhance Client Collaboration

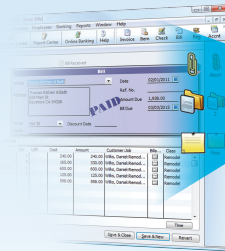
With SmartVault you can safely store and manage all of your firms' documents and clients' documents and communications in the cloud. Quickly and logically organize all your documents online, and enjoy secure offsite back up and recovery of your data and documents. Streamline your workflow with easy file sharing and anytime, anywhere access of your data and documents. Built in organization of your client documents, including invoices, reports, contracts, e-mails, bills, receipts, etc. will save you countless hours and eliminate manual, paper-based tasks.

## SmartVault Features...Designed with You in Mind



### The SmartVault Inbox

Your clients (or internal office staff) can scan documents into an electronic Inbox that you can retrieve for later processing.



### The SmartVault Toolbar

Scan and attach documents directly to more than 30 entries in QuickBooks® with the integrated Toolbar.

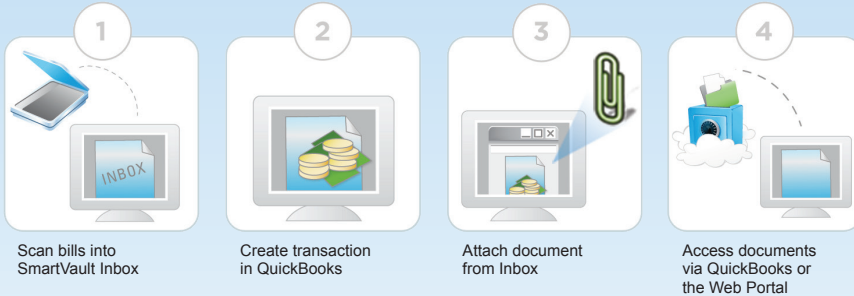


### The SmartVault Web Portal

Get an at-a-glance view of all your clients' documents and manage client tasks with an intuitive dashboard interface.

# Save Time and Work More Efficiently with Your Clients

With SmartVault, you can save time processing bills when you or your clients scan documents directly into the SmartVault Inbox. When creating the transaction in QuickBooks, you simply attach the source document to the entry. Then, you can intuitively access the documents via QuickBooks, the SmartVault Drive, or our online Web Portal.



## SmartVault Client User Packs Bring it All Home

Accountants and bookkeepers using QuickBooks can manage multiple clients from a single SmartVault account using our Client User Packs, which can be added to your Individual, Team, and Professional plans.

Visit [www.smartvault.com](http://www.smartvault.com) to try any Client User Pack FREE for 30 Days!

\* Client User packs must be purchased with either the Individual, Team or Professional plan

With Client User Packs you get:

- Premium technical support
- Five free hours of training
- Volume discounts for multiple clients

### Client User Pack Storage & Pricing

Client Users	Web Storage	Price
5	10 GB	\$39/month
10	20 GB	\$79/month
25	50 GB	\$99/month
50	100 GB	\$199/month
75	150 GB	\$249/month
150	300 GB	\$399/month

SmartVault has designed its paperless solution from the ground up to offer features and functionality our customers need, wrapped up in a very clean, simple to use, integrated interface that delivers an award winning, affordable document management solution to accountants, bookkeepers, and businesses. We firmly believe that SmartVault delivers greater functionality and an overall better user experience than the current document management feature set that is available in QuickBooks 2010. For more, visit [www.smartvault.com/products/quickbooks.php](http://www.smartvault.com/products/quickbooks.php).

We've outlined a few key areas that differentiate the SmartVault solution from the 'out of the box' functionality in QuickBooks 2010:

## Work faster with SmartVault

- Upload documents in the background so you can keep working
- Drag-drop for email messages and attachments from Outlook
- Consistent Toolbar that always works the same way so you don't have to think about it
- A user interface that is designed for responsiveness – with background updates and document uploading so you can keep working
- Ability to disable confirmations for attachments so you can skip steps and repetitive dialogs

## Not just for QuickBooks

- SmartVault is not just for documents that are related to QuickBooks. With SmartVault, you can store all your documents, including your internal working papers and spreadsheets, client engagement letters, contracts, etc.
- You can use SmartVault as a general document portal to share documents with all your clients, not just the ones who have QuickBooks.
- Why have your clients maintain accounts for two separate document management systems? SmartVault offers the best solution for integrated document management with QuickBooks, as well as a fantastic general-purpose document management system for both you and your clients to securely share files and work together.

## Better collaboration with your clients

- You can set your clients up with the SmartVault Inbox to let them scan documents easily – including one-touch scanning with the Fujitsu ScanSnap line of scanners
- The client dashboard offers at-a-glance views of document activity among all client vaults - including documents waiting in the Inbox and urgent notes – so managing daily workflow among clients is easy and intuitive
- Compatibility with hosted environments –share files with your clients and still use our simple scanning solution
- See items in your Inbox across clients without even loading QuickBooks
- Support for earlier versions of QuickBooks means you can handle a wide variety of client configurations with a single document management solution

## Snapshots of QuickBooks company files

- You can set your clients' system up so that a copy of their QuickBooks company file is backed-up to SmartVault every time they close the company file.
- You can download the current copy of their QuickBooks company file at any time, so you can always get the latest and greatest copy of their data whenever you need it.
- Store a permanent backup of any QuickBooks company file in SmartVault at any time (e.g., on a quarterly or annual basis). You can easily restore it for future reference when needed.

## More features, more options

- Download a copy of all your documents any time you want – to prepare for an audit, store offline, or create permanent archives of your own.
- Use notes to track important information that might be useful during an audit, or flag important action items.

### About hosted environments

If you or your accounting clients work in a hosted environment for QuickBooks and your desktop, using a local scanner with QuickBooks 2010 will be challenging because you may not have access to a local scanner from your virtual desktop (this depends on the hosting technology you are using). You'll have to scan documents from a local computer using your scanner's software and then manually upload them one-by-one via file transfer or the Document Center.

Customers in a hosted QuickBooks environment using SmartVault can always use a local scanner to upload documents directly to the SmartVault Inbox, making them immediately available for processing in QuickBooks.

## FEATURE COMPARISON

Feature	QuickBooks 2010	SmartVault	Details
Attach documents directly to entries in QuickBooks	✓	✓	SmartVault can also attach to Home, Snapshot, and Report Center windows, creating a logical place to store company info and reports
Documents are stored in the cloud and can be accessed via Web browser	✓	✓	SmartVault also supports accessing documents from mobile phones like the iPhone; you can't access the QuickBooks Portal from all browsers since it is based on a proprietary flash-based technology
Custom Folders & General Document Storage		✓	With QuickBooks DMS, you can only store and share documents related to QuickBooks. SmartVault is also a general purpose document management system you and your co-workers can use for all your documents.
Map a Web Drive		✓	With SmartVault, you can make your on-line document storage application look like a hard drive to your computer. This means you can create short cuts and "Save to" directly to your online folders.
Download a local archive of all documents on demand		✓	With SmartVault, you can download an archive of any or all of your documents at any time – so you are not locked in
Invite users to share documents via e-mail	✓	✓	Both systems support a simple e-mail invitation model that makes it easy to invite other users to share your documents
Electronic Inbox	✓	✓	With SmartVault, a full-featured Inbox is available for users outside QuickBooks, allowing for better collaboration and distributed scanning
Scan wizard for TWAIN scanners	✓	✓	SmartVault supports scanning with one click vs. multiple steps with QuickBooks 2010, saving you time every time you scan.
Integration with Fujitsu® ScanSnap™ scanners		✓	SmartVault has one-touch integration for scanning to Inbox or attaching to a current entry – the best possible user experience
Scanning solution works with hosted QuickBooks		✓	SmartVault supports working with scanners via the Inbox outside of QuickBooks, so it is an ideal complement to a hosted QuickBooks environment
Store and share snapshots of a QuickBooks company file		✓	Backup, restore and share your QuickBooks company data files. [This is possible with QuickBooks through a separate service for an additional fee, but not intended for sharing.]
Support for US QuickBooks 2010	✓	✓	Pro, Premiere, Enterprise. SmartVault also supports the Canadian version of QuickBooks, which is not supported by the QuickBooks DMS solution.
Support for QuickBooks 2006-2009		✓	Pro, Premiere, Enterprise, so no matter what version of QuickBooks you use, you can standardize on one document management platform
View attached document count at-a-glance		✓	The folder icon on the SmartVault Toolbar shows you instantly how many documents are attached to the current entry
Attach notes to a specific entry		✓	Attach a note to track information that might be useful during an audit
Flag notes as urgent		✓	Urgent notes help you track items that need immediate attention
Attach files using drag-and-drop		✓	Drag-and-drop is an easy way to upload documents that already exist on your computer – much faster than browsing for files
Attach e-mails using drag-n-drop from Microsoft Outlook	✓	✓	Save client correspondence, either an email itself or just email attachments, directly from Outlook with a simple drag-and-drop to the Toolbar, Inbox or Web Drive
Attach from Inbox	✓	✓	SmartVault tells you how many items are in the Inbox without clicking
Attach file from local computer		✓	With SmartVault, upload multiple files at once by using multi-select
Upload files in the background		✓	When you attach a document using SmartVault, get back to work immediately while the document is uploaded in the background – saving you time
View Inbox document count across multiple company files		✓	With SmartVault, you can see at-a-glance how many documents are waiting in the Inbox across all company files – so you know how much work is waiting
Client dashboard		✓	For accountants, the client dashboard shows you how many documents are waiting to be processed and all urgent notes, helping you stay organized

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