

Business Pro Plan for Financial Institutions

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.



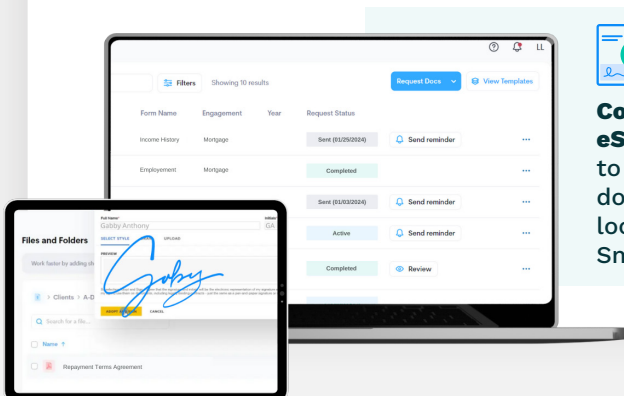
PDF Form Filler: Easily create professional, branded PDF files for your customers to fill directly in SmartVault.



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



Convenient, Compliant eSignatures: Enable customers to upload, review, and eSign docs from wherever they're located, all securely inside SmartVault's client portal.