

## **Results Software Teams Up with SmartVault Delivers the first CRM to share Documents with QuickBooks via SmartVault Integration**

HERNDON, VA., May 11, 2011—Results Software has announced the integration of SmartVault's cloud-based document storage and file sharing service with its award-winning Results CRM solution. This integration leverages Results' and SmartVault's renowned bi-directional integration with QuickBooks to deliver the ultimate 3-way document management solution for Results CRM, SmartVault and QuickBooks users.

The integration with SmartVault provides Results CRM users with an innovative and effective in-the-cloud document management solution, in addition to the existing Results document management options. Results CRM users can now scan, upload, and attach documents to any Results CRM record including Contacts, Activities, Products, Sales Opportunities, Quotes/Estimates, Sales Orders, Projects, Service/Work Orders, Timesheet entries, Invoices, Payments, and Expenses. This allows Results users to access those attached documents from within Results or directly from SmartVault's custom-branded Web Portal.

With SmartVault's seamless plug-ins for QuickBooks and now Results CRM, users get a powerful three-in-one solution for customer relationship management (CRM), accounting, and document management. SmartVault documents can be added by any user to any record in either Results or QuickBooks and after a Results QBI Sync, the documents will continue to be available in both systems, without duplicating storage, regardless of what system they were originally added in.

"While there are a number of CRM systems that integrate with QuickBooks, even the most capable of these systems still have a serious "disconnect" when it comes to document tracking," said Naseem Saab, President and Founder of Results Software. "CRM-connected documents are not available in QuickBooks and vice versa - a major shortcoming for true data access and full visibility of data across the organization. Results Software is leading the way with this intelligent and seamless SmartVault integration, delivering value to its Results CRM users and to the QuickBooks user community by providing this unique 3-way integration."

"We are thrilled to see the integration of SmartVault's document management and file sharing capabilities in the Results Software application," said Eric Pulaski, founder and CEO of SmartVault. "The real power of this integration is in the ease-of-use for the customer who now has a built-in, intuitive document storage solution integrated in an application they are already using and familiar with, reducing any learning curve, and delivering immediate value."

The [Results SmartVault Integration](#) module is currently shipping and is included at no additional charge in all versions of Results CRM.

[Results CRM](#) delivers a complete and flexible approach to business information management and business process automation for sales & marketing, service delivery, customer service, order tracking, project management, time-billing, invoicing, and inventory control. Results CRM provides seamless bi-directional integration with QuickBooks, Outlook, Constant Contact, SharePoint and now SmartVault.

### **About Results Software**

Founded in 1985, Results Software provides Customer Relationship Management (CRM) and business management solutions to a diverse client base that includes small businesses, enterprises and non-profits. With its award-winning software and services, Results Software helps organizations of all sizes streamline their operations, improve efficiencies, and increase their overall business performance.

### **About SmartVault**

SmartVault, a leading provider of Software-as-a-Service document storage and sharing solutions, provides accounting professionals and businesses with an easy and affordable solution for users to store, view, and share files securely any time and from anywhere. SmartVault has earned top honors from Intuit as a QuickBooks Gold Certified Developer, has won both a Readers' Choice Award and a Technology Innovation Award from The CPA Technology Advisor, and has earned Awesome Add-on awards for QuickBooks from The Sleeter Group.

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