

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Jan. 29, 2014

An easier way to share documents with clients and backup Quickbooks

Although she was able to get her staff of six to buy in to moving to digital storage and collaboration within the firm, the real challenge was ahead. How to get clients to understand the potential benefits?

Jan had tried one solution in 2012, but was unfortunately plagued with poor customer service, installation problems and weak tech support from a suite of cloud solutions offered through her copier leasing company. Jan stated, "I was disappointed and eager to find a service that I felt we could really get behind. I knew the technologies were out there, but you still have to pick a starting point based upon the reality of where you are with your current equipment and workflow systems."

The Good News

I often hear two common reasons why business owners become unhappy with their restaurant accounting services. One is that they don't get information back in a timely manner. Secondly, they say their accountant doesn't return calls or emails promptly. Oh, there's one more. They say it's difficult to communicate with their accountant about their business. Agreed, these are frustrating issues. In every task we do and with every service we perform, we commit ourselves to giving you information you need. We understand you deserve a guarantee that our staff is available to you.

The good news is she learned about SmartVault from information found on The

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

back up the QuickBooks company file, which creates an easy, safe way for a client to share the company file with their accountant. Jan and her staff started using SmartVault in 2012 and she says they immediately experienced efficiencies in workflow. Soon after, she started educating her clients on how it could help them, too.

For her clients who also use SmartVault, it helps reduce the time and effort needed to exchange documents and QuickBooks files by mail, email, fax or hand delivery. But Jan wasn't only looking to increase her firm's productivity. She wanted to see a return on her investment and has developed SmartVault services into a revenue-generating value-added service she offers clients.

"Not every restaurant is set up to take advantage of this technology," she said. "But over time, we've approached clients one by one to help them understand the benefits and see how easy it is to use." The web-based system also allows her remote workers, to access client documents easily from their home office computers or iPads with apps that make the work easy from anywhere.

"We are committed to using SmartVault in my business. It has given me the efficiencies I had hoped for and my staff continues to find new ways to improve our internal workflow. SmartVault's knowledgeable sales and tech support staff, plus resource and training tools allowed us to get going with this program faster than expected. Just as important to me is that I have a value added service to offer new clients and a way to continue helping existing ones."

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved