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and Lacerte

Small business accounting and tax company Intuit has partnered with cloud document storage and sharing firm SmartVault, which will provide integrated cloud-based document management for Intuit's two professional tax systems, Lacerte and ProSeries. The combination of these professional programs is intended to further automate tax preparation workflow, from receiving source files securely from clients to printing and sharing final tax returns with a built-in custom branded client portal.

Isaac M. O'Bannon • Jun. 26, 2014



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Intuit is discontinuing its own installed document management systems (DMS) that were previously available for Lacerte and ProSeries.

“We are committed to finding new and innovative ways to save our customers time.

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are involved in the chain of custody for documents, then you are responsible for the security of that data during the entire tax preparation process. This partnership gives Lacerte and ProSeries customers an integrated solution to automate the tax prep workflow and maintain data security compliance at all times.”

SmartVault for Intuit Lacerte and Intuit ProSeries delivers document management and client portal solutions with features that include:

- Document management capabilities built into Lacerte and ProSeries.
- An integrated client portal that can be custom branded for securely sharing tax returns and other documents with clients.
- Easy set up using existing client data and templates—automatically set up users, security permissions, and folder structure for each client.
- Batch email functionality using customizable email templates.
- Audit reports to track employee and client activity.
- Automated email alerts to notify when files have been uploaded or viewed.

“We transitioned 80 clients to the new online process with SmartVault this past tax season and the entire process was so much more efficient because we were able to eliminate many extra steps,” said Darrell Layman, CPA and Intuit Accountant’s Council member. Layman was part of the initial pilot and used the new integration to deliver tax returns to his clients for the April 15, 2014 deadline.

SmartVault for Intuit Lacerte and Intuit ProSeries has been available in limited beta since March 2014. The product will be available to all Lacerte and ProSeries customers starting June 25, 2014. SmartVault will also offer a migration solution for current Lacerte and ProSeries DMS customers to migrate data from DMS to SmartVault. The process will be fully automated and include migrating documents and meta-data.

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