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May. 18, 2015

2015 Innovation Award Nominee:

SmartVault for Intuit Lacerte & ProSeries

www.SmartVault.com

Document management is an integral part of the workflow for tax accountants – getting the engagement letters out, distributing and collecting the tax organizer, getting source files from clients, distributing and managing the eFile forms and ultimately distributing the completed returns to clients. If they use one of the leading tax applications, they are provided a ‘document management’ application as an add-on or part of a bundle with the tax app.

Providing a full document management system or a secure portal to share files with clients is not a core competency of the tax application provider, so the customer settles for a mediocre document management & portal solution that is likely not updated frequently with features that improve the workflow for the tax accountant. And documents stored in that system are silo'd, ‘stuck’ inside a document management system that does not integrate with any other applications. There is simply no innovation in that strategy for the tax accountant.

Intuit Professional Tax Group, developers of Intuit Lacerte and Intuit ProSeries, offered a native document management solution – Intuit DMS – to their customers. The document management offering, while adequate, was really no longer maintained, supported or updated by Intuit and there was no integrated client portal to allow for the secure sharing of files between the firm and their clients.

To satisfy the growing needs of their customers around managing documents and securely sharing files with their clients, Intuit partnered with SmartVault, a best of

breed document management and client portal solution that was built from the

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securely share files for Tax Year 2014.

With SmartVault, the only integrated document management solution for Intuit Lacerte and ProSeries customers, accountants gain massive efficiencies in their workflow with the ability to:

- Store, organize, search and retrieve client information right from within Lacerte or ProSeries – all client data is right at your fingertips
- Scan and save source files directly to a client folder • Open, annotate, edit and save files to SmartVault – just as you would to your desktop or network server
- Leverage a powerful mail merge engine to create custom email templates – email 5, 50 or 500 clients a custom email – huge time saver when distributing returns or organizers • Get a custom branded client portal for securely sharing files – streamlining the task of getting source files from the clients, and distributing returns to clients
- Get a full audit report of who accessed what file and when – to stay in compliance

With SmartVault, the accounting firm gets a single document management solution to store, manage and share all of their files – plus the unique benefit of having SmartVault seamlessly integrate with applications commonly used accounting firms, such as QuickBooks, QuickBooks Online, Xero, Outlook and now Intuit Lacerte and ProSeries. Documents are not in silos, they are stored in one common document management system, and accessed via the web, a mobile or from within the applications themselves.

Click here to see all of the [other nominees for the 2015 Innovation Awards](#).

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