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UltraTax CS Users

This integration enables users to print and automatically route documents like tax returns from UltraTax CS directly to the correct folder in SmartVault.

Isaac M. O'Bannon • Jul. 12, 2023



SmartVault, a leading provider of an integrated, cloud-based document management system (DMS) and client portal platform, has launched SmartRouting, a feature that creates logical, effortless organization between Thomson Reuters UltraTax CS tax application and SmartVault.

This seamless integration enables users to print and automatically route documents like tax returns from UltraTax CS directly to the correct folder in SmartVault. This creates standardized processes between the user, their staff, and their customers, resulting in an improved user experience, greater efficiency, and more effective collaboration.

“SmartRouting is tailored for UltraTax CS and SmartVault users who want to create efficient, scalable processes powered by a leading-edge tech stack,” said SmartVault President, Dania Buchanan. “The integrated experience between UltraTax CS and our document management and client portal platform – that over 30,000 accountants

rely on today – will alleviate the pain points many UltraTax CS users have with their

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www.smartvault.com/integrations/ultratax.

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