

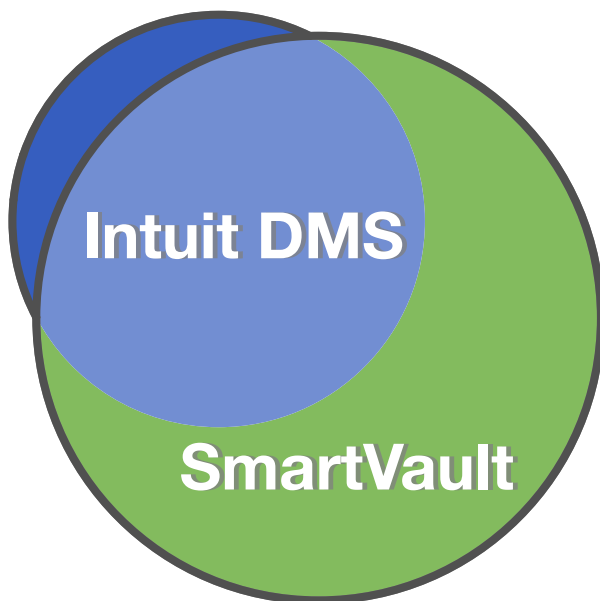
# Transform Your Tax Prep Workflow

With SmartVault for **intuit**. Lacerte and **intuit**. ProSeries

## Document Management Features

- Lacerte & ProSeries integration
- Files are encrypted at rest
- Ability to print PDF from Lacerte & ProSeries
- Ability to save directly from Word, Excel, Outlook
- Secure email / sharing with clients
- Scanner support
- Scan PDFs to document storage
- Access and view PDF and docs from office
- Import client list from Lacerte and ProSeries
- Create custom folder template
- Audit report to track client and employee activity

## Get More with SmartVault vs. DMS






## New Features

- Secure client portal (custom branded)
- Cloud storage for 24x7 access
- Secure email / sharing with clients
- Audit report to track client and employee activities
- Auto email notifications alert when files are uploaded or viewed
- Folder-level security permissions
- Mapped drive to store PDF / docs
- Customizable folder templates by client type
- Version history
- Batch email clients
- Customizable email templates

## Coming in TY2014

- View bookmarked PDF
- Ability to annotate PDF
- Ability to add/remove and rotate pages in PDF
- Submit docs to Intuit Tax Import

## KEY FEATURES

 Embedded workflow	 Cloud storage	 Secure file sharing
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SmartVault®   
**intuit**®