

5 Benefits of Working in the Cloud



SmartVault



Accessibility & Flexibility

Cloud-based document management systems and client portals allow accountants, staff, and clients to **access their data anytime and from anywhere**, as long as there is an internet connection.

This gives everyone **flexibility for remote work and collaboration**. And, with on-the-go, real-time access, teams can quickly respond to urgent requests when they're away from the office.

Transitioning to the cloud is also one step you can take to **make your firm more attractive to high-quality staff members**.



Data Security & Backup

Protecting your clients' data from cyber-attacks is crucial to maintaining your reputation, retaining your customers, and avoiding costly downtime due to breaches.

Cloud-based software has **advanced security measures**, like encryption, granular access controls, regular data backups, and authentication processes. This means your **data is kept safe from unauthorized use, and you can be confident you won't lose anything** due to a natural disaster or hardware failure.



Automation & Consistency

Automation takes over old-school accounting tasks that used to take hours and cause massive amounts of stress.

Let's take client requests, for example. You need clients to send you their tax documents; instead of individually emailing or calling them – and then manually tracking and saving returned documents – **using a document management system can move this entire process to the cloud**.

Use your DMS to send clients – whether it's one client at a time or a few thousand – **a list of exactly what you need and enable them to upload everything securely online**.



Collaboration & Efficiency

Working in the cloud can **solve some of the everyday headaches** you experience when working with clients and staff.

Instead of playing phone tag or dealing with hardcopy paperwork, you can **quickly share, request, and store all your documents online**. This makes it much easier for your team and clients to access the documents.

Smooth client collaboration is a crucial element of increased client retention and referrals – the backbone of your business. The cloud is a highly effective way to **streamline your process, facilitate communication, and make your clients' experiences positive**.



Scalability & Cost Savings

Stop wasting hundreds of dollars and endless hours every time your practice's chosen software program gets an upgrade.

Cloud-based accounting software vendors update their features and security throughout the year typically at no additional cost to the user, and the updates are pushed out through the cloud. This means you or your team **don't waste time manually updating software**.

Furthermore, you **won't need to purchase extra storage space, multiple servers, or a space to house those servers**. Nor will you need to hire an in-house IT expert or an outside contractor to manage them.

Ready to Make a Smooth Transition to the Cloud?

Moving your accounting practice to the cloud doesn't have to be overwhelming. In our free guide, **6 Crucial Steps to Become a Fully Online, Adaptable Practice**, you'll learn what exactly "the cloud" is and what steps you can take to make the transition seamless.

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