

Streamlining Your Entire Workflow

With SmartVault and UltraTax CS®



Without SmartVault and UltraTax CS



Onboarding Clients & Requesting Documents

Send a request list showing clients what forms and documents to complete and upload online



Manually request and remind clients to submit documents and forms via email, mail, or bringing them to the office

Track submittal status in a dashboard and quickly send clients reminders



Manually track submittal status and remind clients

Receive a notification when documents are uploaded; they're automatically saved in the correct folders



Manually organize, name, and save documents as clients provide them

Document Organization, Storage, and Staff/Client Access

Documents organized and stored digitally in a DMS and client portal



Documents scattered across folders, computers, and filing cabinets

Accountants, staff, and clients can securely access files anytime, anywhere



Difficult to find, organize, and share files

Can review, approve, sign, and share docs all through one system



No centralized digital storage for staff or clients to self-serve

Processing Tax Returns

Print returns from UltraTax CS to save them directly into SmartVault



Manually save return into SmartVault

Electronically share return with client to review and sign



Send completed return for client review and signature

Client signs the return electronically; it automatically routes to the correct folder



Clients return signed documents by mail, email, or dropping them off in person

Automatically and effortlessly route and organize files with SmartRouting by SmartVault

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