SmartVault

Streamlining Your Entire Workflow

With SmartVault and UltraTax CS®



Without SmartVault and UltraTax CS



Onboarding Clients & Requesting Documents

With SmartVault and UltraTax CS®	Without SmartVault and UltraTax CS
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

With SmartVault and UltraTax CS®	Without SmartVault and UltraTax CS
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

With SmartVault and UltraTax CS®	Without SmartVault and UltraTax CS
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

Learn More

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