

ACCOUNTANTS

Karr & Boucher, PLLC

“We have for sure saved time because we can easily support our out-of-state and out-of-country clients. Having a system that is ‘always on’ is great.”



JIM ROBERGE
CPA, Partner

Core Business

Full-service tax and accounting firm

Homebase

Manchester, NH

Business Launch

1989

Employees

7 Full-Time

Technology of Choice

SmartVault, Lacerte

Having it all in one solution...

SmartVault offers firm a single platform for document storage and sharing and on-demand client communication

When Lacerte announced that it was sun setting its DMS product, leaders within the firm of Karr & Boucher, PLLC looked at SmartVault to fulfill their document management needs.

Firm partner, Jim Roberge, CPA, stated, “We first looked at everything that we wanted to accomplish in terms of document management and sharing files with clients. SmartVault offered it all in one platform. That’s what sold us.”

The firm takes advantage of SmartVault’s powerful document management capabilities as well as client portals. Prior to SmartVault, the firm did have a portal system in place. According to Roberge, the solution offered a “low-level file transfer system” at best.

A major issue with the previous system was its limitation in terms of portal assignment. “With our bigger clients, we needed to be able to assign several portals to one email, but the system didn’t support this. It was a big issue. SmartVault solved this issue.”

On the document management side, the firm is also exceptionally happy with SmartVault’s ease of use—for both staff and clients.

“It’s very easy to get a client up and running. And the way you can customize client folders is so helpful. This keeps us organized and our filing structure logical,” said Roberge.

The SmartVault Connected Desktop was the big home run, however. The ability to simulate a local mapped drive allows staff to work efficiently and within a familiar structure. “To me, this is the best feature. I don’t know that I would use it as much without it. It’s so much easier to work within a local drive than a browser. For example, adding tax engagements is very fast.”

Clients have also found the system easy to use...even the most resistant to change. Roberge recalled one client that would drive 25 miles to drop off a thumb drive. During one visit, one of the partners showed the client how to upload files to the SmartVault Portal. “It took five minutes to explain, and the client starting using the portal immediately,” recalled Roberge. “As soon as they actually give it a try, they tend to be hooked.”

Roberge and his colleagues have also felt the efficiency gains since making the transition to SmartVault. “We have for sure saved time because we can easily support our out-of-state and out-of-country clients. Having a system that is ‘always on’ is great.”

Firm staff is also working much more efficiently because SmartVault has helped to streamline processes. “The scan utility is great. It makes it fast to add documents and we can edit pages easily as well.”

And the firm will continue to experience productivity gains as they continue their move to paperless.