

Transformation in the Digital Age:

How SmartVault Can Help Your Business
Go Paperless



SmartVault

Introduction

The way we conduct business today is increasingly changing. As digital transformation seeps into every aspect of commerce and business, companies in all industries must adapt to keep up with the demand for paperless options. In order to stay competitive, companies have to be willing to put tradition aside and integrate their operations into the new digital way of doing business.

Even companies in traditionally paper-heavy industries — like accounting — must now evolve with the times and enter into the digital age. This means moving away from outdated paper transactions and moving towards digital operations like *paperless document management*.

What to Look for in a Paperless Solution

But digital transformation isn't typically a seamless transition. To make the move to paperless as painless and efficient as possible, you need the right solution. SmartVault is an industry-leading online platform that:



Allows users to securely and easily store, manage, and share their important files



Has been trusted by more than 1 million users across 6,000 businesses since 2008



Is the preferred option for many **accounting firms** who wish to undergo a transition from paper documentation to hosting their data in the digital space

What should accounting firms look for in a paperless document management solution?

You'll want to invest your time and money into a solution that addresses essential factors such as *efficiency, security, and client satisfaction*.

Keep reading to learn more about how a switch to SmartVault will change how your business operates across these three key areas.

Efficiency

There is a reason that paperless transactions have become more and more commonplace throughout the world. Digital operations are more convenient for both consumers and businesses. Shifting to a digital space inevitably saves time, money, and other resources previously spent on creating and managing traditional paper trails.

Undergoing a digital transformation for document management and secure file sharing has a variety of benefits for your accounting business operations. From an improved workflow to the knowledge that your files are safe and secure, a platform like SmartVault can drastically improve your company's efficiency and organization.



Cloud-based Document Management

SmartVault is a true cloud-based document management solution with unlimited storage and 24/7 remote access to ALL of your documentation at once. Unlike traditional methods, hosting your files in the digital space allows both you and your clients access to necessary documents – anywhere, anytime.

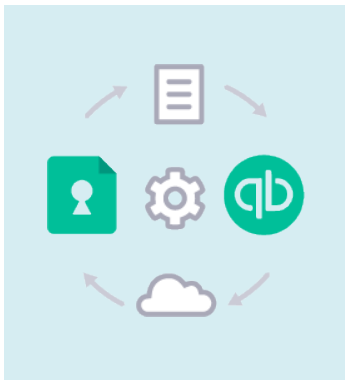
Digital platforms not only allow you to operate with increased efficiency but also grant you the ability to work with clients outside of your local area, expanding your business opportunities.



Unmatched Accessibility

With SmartVault, your documents are accessible at any time from our desktop app or via the internet. You can send and receive documents securely with clients from anywhere in the world in real-time. With business becoming increasingly global, digital solutions are the way to go.

Best of all, a digital solution such as SmartVault eliminates the need for physical storage of years' worth of records, essentially serving as a digital filing cabinet. This also makes the organization of your paperwork a piece of cake, with digital tools such as folder templates and full text search of all your documents.



Built for Accounting Workflows...with Tax App Integration

SmartVault has been designed from the ground up to accommodate the workflow and efficiency needs of modern day accountants. For example, SmartVault is the first company in the industry to offer full integration with Intuit. Additional integrations include QuickBooks, DocuSign, Xero, Freshbooks, Intuit Lacerte & Intuit ProSeries, Salesforce, Acctivate, Hubdoc, and TaxCalc. Users can also benefit from features such as full activity reporting, print driver integration, task automation, a customizable client portal for secure file sharing, and assigned employee access for a more efficient workflow from start to finish.

Accountants appreciate efficiency, and SmartVault gives you just that.

Security

When making the transition from traditional paper storage to the digital space, security is one of the most important factors to keep in mind. Your digital document management platform should expertly cover any cybersecurity gaps, protect your data against ransomware, and be securely backed up regularly in order to protect your digital assets against data loss.

When dealing with sensitive and confidential data like clients' personal and financial information, these security aspects are even more vital to your business operations. Accountants must be extra vigilant to protect against data breaches and cyber-attacks.



Security-first Mindset

At SmartVault, your data is securely covered every step of the way. Our platform is built with a security-first mindset and a multi-disciplined approach to protecting your valuable documents. SSL encryption protection covers your documents while in transit, and AES-256 bit encryption protects your data while in database storage.

With SmartVault, all data is stored securely with encryption and two-factor authentication, and it's backed up to the cloud for your peace of mind. When you rely upon a cloud-based solution like SmartVault, you no longer have the concern of needing to manually back up and encrypt your data yourself. Instead, your data is hosted using services provided by Amazon Web Services (AWS) and deployed across multiple data centers. All data is maintained in both a live data center and offsite archive. A second copy of all your files is created and archived within 24 hours of your initial document creation. Additionally, most SmartVault plans offer access to unlimited revision history and deletion recovery for increased peace of mind.



A More Secure eSign Process

With our built-in DocuSign integration, businesses such as accounting firms can easily send sensitive documents for eSignature from SmartVault through an end-to-end encrypted process. The signed documents will be automatically routed back to the desired client folders, and confidential data is protected every step along the transfer, making it a much more secure way to eSign documents compared to alternative methods such as attaching PDFs with eSignatures via emails.



Better Compliance and Permission Authentication

In addition, SmartVault helps your business stay compliant with the tools and solutions you need to stay up to date with various requirements for recording and verifying all reporting. Compliance is a critical part of any accounting firm's operations, and SmartVault can help you achieve GLBA Compliance, PCI DSS Level D Compliance, and UCC 9-105 Compliance, among others.

Lastly, all document access is controlled via authenticated logins that allow you to securely share your data with only those individuals who have been granted the correct permissions. SmartVault's secure file sharing is hosted in the cloud and offers an online platform with the capabilities to send, receive, and request files. Advanced user controls include the ability to differentiate between different levels of access, including Read, Write, Create, and Delete permissions. Your account can even be set up to receive time-stamped activity reports and email notifications about all file activity. This file-sharing system allows users to enjoy the convenience of sharing files on the cloud without compromising on security.

Document security is a must in accounting, and SmartVault's advanced security capabilities help you keep every document safe.

Client Satisfaction

Upgrading your business to a digital file management system can also increase your level of client satisfaction and retention. Your customers don't like dealing with the hassles of paperwork and documentation any more than you do, and a switch to a digital solution like SmartVault benefits both parties.

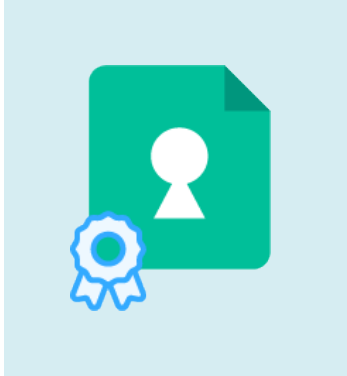
At SmartVault, our features and services stand out amongst other platforms like Citrix File Share, Canopy, Fileable, and Dropbox Business. SmartVault continues to evolve and innovate our products and service offerings to best meet the needs of our businesses and their clients.



A Streamlined Tax Season

SmartVault makes tax season more streamlined and stress-free for both tax firms and their clients. Compared to traditional paper-heavy firms, paperless businesses benefit from improved client satisfaction, better client communication, and more efficient workflows. Meanwhile, clients benefit from SmartVault's industry-leading features, including top-notch data protection, quick and easy virtual workflows, secure access to their own digital files, and a convenient account communication hub.

On-demand trainings enhance the user experience for both businesses and their clients with topics like File Management, Integration with QuickBooks, and Getting Ready for Tax Season.



Capterra Top Performer

Capterra reviews rank SmartVault as a top performer and emerging favorite in 2021 in the category of file-sharing software. Businesses report that having a secure portal like SmartVault available to their customers is a positive element that attracts new clients. Another common praise is the ability to efficiently send and receive data back and forth between clients.

According to user comments on Capterra, businesses had a variety of reasons for choosing SmartVault over their previous data solutions. Many users had issues with files disappearing or becoming corrupted with other digital platforms such as SharePoint. Others desired to have access to SmartVault's unique onboarding assistance and data migration solutions. In addition, SmartVault provides an abundance of integrations, makes a good addition to Tech Stack, is user-friendly, and offers a wide variety of customizations and templates.

For those businesses who have yet to make the switch from paper documentation to digital file storage, these factors become even more promising. Going paperless will elevate your business operations and customer satisfaction into the 21st century.

Ready to make the switch to a paperless solution?

SmartVault delivers top-notch digital document management services with all the security and productivity features you need to effectively run your business. We help over 25,000 accountants and businesses securely share files with over 1,000,000 clients every day.

[Schedule Now »](#)

To see how SmartVault can help improve your business, give us a call at 866.674.6785 or book a 15-minute demo today to begin your journey to paperless data storage and digital integration.