

5 Tips for Tax Season



01 Integrate your tech

When you integrate your technology, there is no need to repeat the same work in different applications; when you create a client in Lacerte, it will auto-create in SmartVault.

02 Use Request Docs to request files from your clients

Request multiple documents from multiple clients at the click of a button, then keep track of who has sent what, and send reminders easily from the SmartVault dashboard.

03 Implement central document storage

Avoid document silos; store all documents in a central repository, making them easy to find and keeping your firm secure and compliant.

04 Publish returns directly into your clients' vault

Print directly from Lacerte into the correct client vault within SmartVault, saving time and keeping documents secure both internally and externally.

05 Automate workflow with eSignature

No need to upload or download documents when you integrate DocuSign with SmartVault - allow your clients to sign digitally, directly inside their personal client portal.

More about SmartVault...

