

SmartVault and Intuit® DMS

SmartVault 

Intuit® DMS

Intuit Lacerte and ProSeries Integration	✓	✓
Import client list from Lacerte and ProSeries	✓	✓
Create custom folder templates	✓	✓
Send password protected file via email	✓	✓
Integrate with scanner for easy upload	✓	✓
Save documents directly from Word, Excel, Outlook	✓	✓
Submit documents to Intuit Tax Import	✓	✓
Integrated custom branded portal for sharing documents	✓	
Online document storage with access via encrypted link	✓	
Automatically create folders and client permissions from Lacerte or ProSeries	✓	
Add a client login to your website	✓	
Auto alerts notify when files are uploaded or viewed	✓	
Customizable email templates and mail merge automate document distribution	✓	
Batch print documents to SmartVault	✓	
Audit report to track client and staff activity	✓	
Full text search of documents	✓	
Continuous off-site backup of documents and data	✓	