

Pair SmartVault and Lacerte for a Powerful DMS and Workflows

SmartVault is the only built-in online document storage and secure file sharing solution for Lacerte. In fact, it's such a powerful pair that Intuit DMS users typically switch to SmartVault's integrated DMS and client portal to save more time, collaborate better with clients, and improve data security.

Maximize workflow efficiencies in Lacerte

Easily import clients into SmartVault from Lacerte, submit documents to Intuit Tax Import, print tax returns to the correct client folder, and much more.

Collaborate through a branded client portal

Give clients an easy and professional way to view, upload, and download documents from a portal that's accessible anytime, from anywhere, and on any browser.

Migrate files over with ease

Whether you need to migrate 10+ years' worth of files or you're just getting started, you can get up and running in a matter of minutes. SmartVault offers many training and configuration options to meet your needs.

Gain all the storage you need

Never worry about running out of storage space. SmartVault gives you unlimited storage and guest users, so it grows as your firm does.

Gather, organize, and share files securely

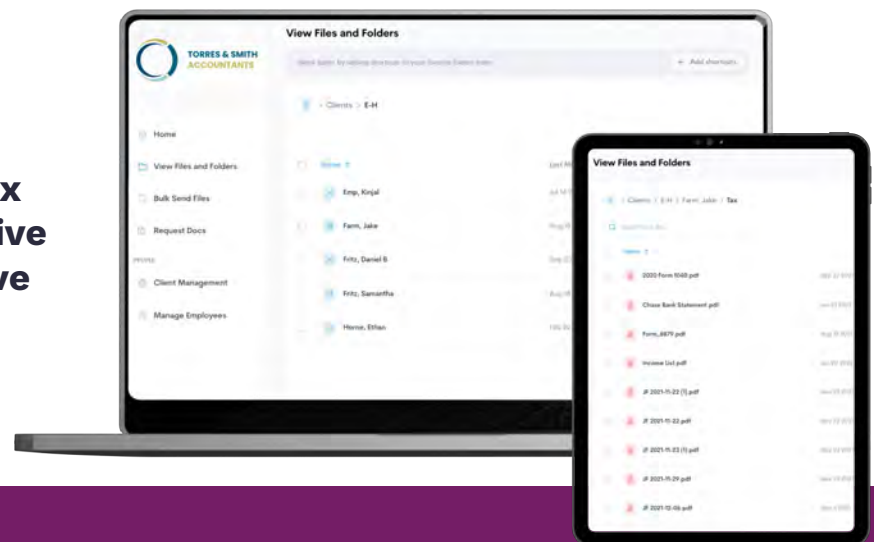
Built with bank-level security, all documents stored in and shared from SmartVault are encrypted – both in transit and at rest. Manage advanced user permissions so only authorized persons have access.

Don't stress about compliance and security

SmartVault supports compliance with major worldwide regulations, like HIPAA, GDPR, FINRA, SEC, GLBA, CCPA, and more.

“ I love the integration with Lacerte...SmartVault has allowed us to keep adding tax clients without having negative impacts on our ability to serve them efficiently.”

John Coleman, CPA, owner
Commonwealth Business Services



Say Goodbye to Admin Tasks with Powerful Automations

- ▶ Clients you create in ProSeries are automatically created in SmartVault, complete with your customized folder structure.
- ▶ Print all copies of a return to SmartVault and each version is automatically filed into the correct client folder.
- ▶ Email notifications let clients know when returns are finished and available for download.

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	✓	

See SmartVault in Action

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