

Keeping Small Businesses Secure and Organized: How SmartVault Transformed a Tax & Bookkeeping Firm

Office Service Solutions, Inc. | New Castle, Delaware

Provides bookkeeping, accounting, consulting, and tax services to help individuals and small businesses reach their financial goals.

The Challenge: Unorganized Files and Tedious Security

For small accounting firms like Office Service Solutions, Inc., organization is everything. With hundreds of clients, Accounting Manager Asher Please knew he needed a better system to track and secure client documents.

They previously stored files on a local network device, which was becoming increasingly cumbersome as the company grew. Emailing sensitive documents required tedious security measures, and misplaced files led to frustrated staff and clients. It was time for a change.

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Asher Please, Accounting Manager

The Solution: Cloud-Based Document Management

After implementing SmartVault, the improvements were immediate. No more fumbling with PDF permissions or insecure email. SmartVault, a cloud-based document management system and client portal platform, keeps all files neatly organized and securely stored.

The Benefits: Organization, Security, and Accessibility

“SmartVault allows us to better track all of our client documents with ease,” Asher says. “It allows us to work remotely, if needed, without ever having to worry about not having the right file on my laptop.”

And forget rummaging through emails. Clients can now log into their portals to access documents anytime, anywhere. “Cases of lost documents are massively reduced,” Asher states, “And most [clients] appreciate knowing they can always log in and retrieve their files without hunting through old emails.”

When asked if he would recommend SmartVault to other firms, Asher didn’t hesitate: “Yes, I would recommend it. It’s important to have software to keep our firm convenient and secure in a progressively digital world.”

For growing companies like Office Service Solutions, SmartVault provides the organization and efficiency needed to focus on what matters most: serving clients.

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