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Apr. 22, 2014

2014 Innovation Award Nominee:

SmartVault for Intuit Lacerte and ProSeries Tax

SmartVault and Intuit Professional Tax Group

Intuit Professional Tax teamed with SmartVault to provide tax customers a cloud document management service and secure client portal that they can access right from Lacerte or ProSeries. This solution provides accountants the opportunity to store files online and share sensitive and confidential documents with their clients.

With SmartVault for Intuit Lacerte and ProSeries Tax, customers can print and securely share tax returns from Lacerte or ProSeries in one easy step. Accountants' tax prep workflow is transformed with SmartVault's seamless integration between Lacerte and ProSeries tax software delivering an online document storage solution and secure client portal for safely sharing files.

This integration makes set up easy and efficient – users, security permissions and folder structures are automatically created for each client – based on data from Lacerte or ProSeries. Once the integration is configured, the tax preparer can print and securely share tax returns in one click, right from Lacerte or ProSeries.

Additional features and functionality designed to streamline workflow for the accounting professional include the ability to use custom email templates to auto notify clients that files are ready for download, or to request tax related source documents directly from the client.

With this intuitive integration, these communications can be triggered based on actions in the tax application (e.g., when a tax return is complete and printed, the

return is automatically dropped into the specific client folder in SmartVault. When

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Audit reports can also be generated to track employee and client activity (who viewed, downloaded or uploaded a file, and when). The simplicity of the SmartVault integration with Lacerte and ProSeries means little business interruption for accounting professionals' clients. Staff can be up and running in no time, and with SmartVault, data is secure in the cloud.

Overall, this integration is helping accountants using Intuit Lacerte or ProSeries gain significant improvement in their workflow. Clients no longer need a separate document management system, and a separate file sharing solution – with SmartVault for Intuit Lacerte and ProSeries Tax, they now have one solution for storing and securely sharing all of their files – integrated within Lacerte or ProSeries Tax.

Both Intuit and SmartVault interviewed tax professionals to gain a better understanding of their specific needs and built an integration specifically for professional tax preparers to streamline their workflow.

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