

SmartVault Helps UltraTax CS Users Unlock Higher Levels of Efficiency with New SmartRouting Feature

HOUSTON, TEXAS, UNITED STATES, July 11, 2023 /EINPresswire.com/ --

[SmartVault](#), a leading provider of an integrated, cloud-based [document management](#) system (DMS) and client portal platform, is excited to announce SmartRouting, a feature that creates logical, effortless organization between Thomson Reuters® UltraTax CS tax application and SmartVault.



SmartVault

SmartVault Logo Document Management

This seamless integration enables users to print and automatically route documents like tax returns from UltraTax CS directly to the correct folder in SmartVault. This creates standardized processes between the user, their staff, and their customers, resulting in an improved user experience, greater efficiency, and more effective collaboration.

“

SmartRouting is tailored for UltraTax CS and SmartVault users who want to create efficient, scalable processes powered by a leading-edge tech stack,”

*Dania Buchanan, President,
SmartVault*

“SmartRouting is tailored for UltraTax CS and SmartVault users who want to create efficient, scalable processes powered by a leading-edge tech stack,” said SmartVault President, Dania Buchanan. “The integrated experience between UltraTax CS and our document management and client portal platform – that over 30,000 accountants rely on today – will alleviate the pain points many UltraTax CS

users have with their current DMS options.”

SmartVault offers accounting professionals a unified platform that ensures secure document collection, storage, and collaboration among team members and their clients. “This integration with UltraTax CS lets users further elevate their productivity and enhance client interactions, optimizing their overall workflow and increasing profits,” said Head of Product, Daniel Fritz.

For more information and to see SmartRouting in action, please visit www.smartvault.com/integrations/ultratax.

###

Jonathan Young

SmartVault

+1 517-918-9353

[email us here](#)

Visit us on social media:

[Facebook](#)

[Twitter](#)

[LinkedIn](#)

[YouTube](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/643730394>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.