SmartVault Becomes First Document Management Platform to Integrate with Intuit ProConnect™ Tax

Automated workflows and centralized document management help firms save time, eliminate manual tasks, and create consistent firm-wide processes.

ANN ARBOR, MICHIGAN, MI, UNITED STATES, January 28, 2025 /EINPresswire.com/ -- SmartVault, a leading provider of a cloud-based document management system (DMS) and client portal for accounting professionals, has expanded its ten-year strategic partnership with Intuit by integrating with ProConnect™ Tax, the industry-leading cloud-based tax software. This jointly developed integration enables seamless, high-value document workflows between ProConnect and SmartVault, offering significant efficiency improvements over standard print-to-PDF or mapped drive solutions.

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>
> *Dania Buchanan*

The integrated experience automatically creates clients in SmartVault and enables printing and auto-routing of tax returns from ProConnect to the correct client folder in SmartVault. These features save time, reduce manual errors, and eliminate inefficiencies caused by document silos and disjointed workflows. By centralizing document management processes, the integration enhances data security and compliance, providing a streamlined and secure solution for tax professionals.

“SmartVault has established itself as the first integrated document management system for Intuit Lacerte, ProSeries, and now ProConnect, which reflects Intuit's confidence in our ability to deliver a high value, integrated DMS and portal platform across Intuit’s ecosystem of tax prep apps,” said Dania Buchanan, President of SmartVault. “Firms today can’t be locked into antiquated all-in-one platforms if they want to improve efficiencies and grow profits. We fully support Intuit’s vision of enabling a best-of-breed app ecosystem and we are thrilled to be the first to offer ProConnect customers a robust, modern online DMS platform to manage their end-to-end document and tax prep workflows securely.”

Key benefits of the SmartVault-ProConnect integration include:

Dania Buchanan, CEO, SmartVault

Reduce duplicate data entry and manual errors: Through the integration with ProConnect, SmartVault automatically creates client profiles, security permissions, and folder structures for each client.

Fully automated document workflows: Print and automatically route tax returns from ProConnect to SmartVault, where they'll be filed in the correct client folder by tax year, accessible by the firm and client.

Efficient document delivery, eSign, and payment workflows: Secure, branded portals and customizable request lists allow clients to upload source documents, review returns, eSign, and pay for services securely from any location.

Scale without constraints: Unlimited document storage and client users allow firms and clients to upload, share, and access documents in one place with no added cost.

Keep data safe: SmartVault is SOC 2, Type 2 compliant with advanced encryption, two-factor authentication, activity reports, and granular access controls to help firms meet data security rules enforced by regulators like the Federal Trade Commission.

Seamlessly migrate to the cloud: SmartVault has document migration services that make it easy to transfer documents stored in other document storage systems to SmartVault.

The SmartVault and Intuit ProConnect integration is scheduled to release in early Summer 2025. Join the wait list and be notified immediately when the release is available to customers at www.SmartVault.com/ProConnect.

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