



[Copetti announces launch of new technology to help small business](#)

We have implemented the a new platform that among its features, enables the secure exchange of tax documents between and individual or a business.

Online PR News â€œ 03-August-2018â€œ Copetti & Co. announce their successful launch of new technology to aid customer communication The exchange of documents and signatures at tax time, have historically taken its toll in travel time, time away from a busy life and business and travel costs. At Copetti we have implemented the SmartDesk platform, that among its features, enables the secure exchange of tax documents between an individual or a business and the accountant. As a â€˜plankâ€™ in Copettiâ€™s Virtual CFO offering to business, the SmartDesk functionality for secure corporate documents has been redeployed for the individual, replacing a number of single-use applications.

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â€œCustomers donâ€™t have to come to the office to discuss, complete and sign tax documents, avoiding geography and weather as limiting factorsâ€• says Kim Copetti, CEO of Copetti & Co. â€œWe can gather information, develop the forms, get signatures and make the submission to CRA all online! Itâ€™s faster, more efficient and much more respectful of customerâ€™s time.â€•

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â€œOur technology journey recently included a new website in Q1 that generated significant new business, and we had to quickly deploy a process to increase our capacity across our multiple locations. As well as adding resources we looked to the SmartDesk platform to make it easier for existing resources. We started to implement customers in Q3 and saw immediate benefits as well as compliments from our customers. We are enthusiastic about the new process and our eventual evolution to predominant virtual communications with customers.â€•

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SmartDesk is a Marketing Automation and Secure Document Exchange platform produced by SmartDeskCRM Inc., of Whitby, Ontario. Along with the most cost-effective platform available, the associated services use the proven SmartDesk web development, SEO and marketing campaign processes for the most effective deployment of SmartDesk. With a special focus on small and medium businesses, as well as not-for-profit organizations, SmartDeskâ€™s unique features are designed for a speedy implementation and rapid digital transformation.

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Copetti and Company is a premier full-service accounting firm which has been serving the Durham region for over 20 years. We are committed to the success of our clients, our people and our community. The firm provides accounting and New Business Set Up, Payroll Management, Bookkeeping Services, personal and corporate tax compliance and business advisory services. We serve a variety of clients ranging from

individuals and families to owner-managed businesses and not-for-profit organizations.

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