# Client One-Pager Templates for Data Sharing

## Introduction

To help your clients understand the benefits and security of your new data sharing process, we've created two one-pager templates that you can customize with your firm's branding.

These documents are intentionally unbranded so you can easily add your firm's letterhead, logo, and contact information. Simply replace "[FIRM NAME]" with your firm's name throughout the document.

Choose the option that best matches your communication style and client preferences:

**Option 1: Comprehensive Overview** - Provides detailed information about features, security, and the step-by-step process. Ideal for clients who prefer thorough explanations.

**Option 2: Benefits-Focused** - Uses a streamlined format highlighting key benefits and your client's simple role in the process. Perfect for busy clients who want essential information at a glance.

Both templates emphasize the time savings, security standards, and ease of use that make this new process beneficial for your clients. Feel free to customize the content further to match your firm's specific messaging and client needs.

**Remember:** Adding your firm's professional branding and contact information helps reinforce trust and provides clients with a direct point of contact for any questions about the data sharing process.

## Option 1: Comprehensive Overview

## Innovative Data Extraction Tool: Enhancing Your Audit Experience

At [FIRM NAME], we’ve partnered with Validis to release an innovative data extraction tool designed to streamline the audit process. By allowing us to use Validis, you are opting for a **secure, efficient, and user-friendly** way to share your financial data. This tool significantly reduces the time and effort traditionally required for audit preparation, allowing you to focus on running your business while we handle the audit process smoothly and efficiently.

**Effortless Data Sharing**

* **Push Technology:** This new data extraction tool connects to your accounting package using a **one-time, read-only** connection, controlled by you.
* **Wide Compatibility:** Works with an array of **desktop and cloud-based** accounting packages.
* **Time-Saving:** Reduces the time you spend compiling and providing financial information.

**Minimal Disruption**

* **Brief, One-Time Connection:** The process is quick and does not linger on your system.
* **No Additional Software:** Most modern computer systems can run the data extraction tool **without extra installations**.

**Embedded Security**

* ISO 27001 & SOC 2 Type II Certified: Validis adheres to the highest security standards.
* Data Encryption: All extracted data is encrypted before transmission.

**You're in Control**

* **Initiate the Process:** You decide when to grant access and share your data.
* **Selective Data Sharing:** This innovative tool extracts **only the necessary** financial information.
* **No Payroll Access:** Employee information remains private and **is not accessed**.

**Simple Process**

* **No System Changes:** Operates in **read-only mode**, ensuring no alterations to your accounting data.
* User-Friendly Portal: Submit your data easily in just a few minutes.

**How It Works**

1. You'll receive an email from [FIRM NAME] with a **secure link**.
2. Click the link and follow simple on-screen instructions to sign in to the portal.
3. Initiate the **data upload** process.
4. This innovative data extraction tool securely extracts and transmits your data to our team at [FIRM NAME].
5. We analyze the **standardized reports**, saving you time and effort.

**What is Extracted?**

* General ledger
* Chart of accounts
* Customer names
* Sales invoice transactions
* Sales payment transactions
* Supplier names
* Purchase invoice transactions
* Purchase payment transactions

For more information, contact your [FIRM NAME] representative today!

## Option 2: Benefits-Focused

We know that your time is valuable and have invested in a new technology that we believe will reduce the amount of time that you would normally spend preparing and supplying documents and reports that we request from you.

Using the push technology of Validis, you will initiate and grant access to a brief connection allowing our software to share a “read-only” snapshot of your accounting data.  This will save you a considerable amount of time and help us create an accurate, in-depth financial picture of your business.

|  |  |
| --- | --- |
| **Benefits to You**   * This simple and secure portal is user-friendly and only takes a few minutes to submit your financial data. * This will free up much of the time you normally spend compiling the financial information that we require. * All your data is encrypted and protected to the highest security standards. * Data is purged from the system upon completion of the engagement process to maintain security. | **Your Role in the Process**   * Watch for an email and click on the secure link contained in the message. * Follow the simple on-screen instructions to sign on to the portal and submit your data. * If you have any questions or difficulties, we can walk you through the process. |

**Data Security**

The below gives you a quick visual to help you understand how the tool protects your information through the signup, data upload, data transmission, and storage/retrieval process. At our company data security is our top priority. The tool is sourced from an ISO27001-certified organization.  In conjunction with Microsoft Azure, the tool maintains the highest level of security.

Microsoft Azure is [ISO/IEC27001](https://servicetrust.microsoft.com/ViewPage/MSComplianceGuide) & SOC 2 certified which covers all the data uploaded to and used by Validis.

