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## LedgerDocs

### LedgersOnline Inc.

LedgerDocs is a cloud-based document management tool dedicated to helping bookkeepers and accountants manage, share, and collaborate on important documents with their clients. The application helps to streamline the bookkeeping and accounting process as financial professionals are able to receive documents such as invoices and receipts from clients quickly and efficiently, while being able to view these documents at any time, from any location.

Bookkeepers and Accountants are using LedgerDocs to manage multiple client engagements, which lets them keep all client documents in one secure online document storage place. They can easily invite each of their clients to view their files, make notes, and provide context to their documents with the flexibility to seamlessly flow through them from any computer using the in-browser document viewer.

Meanwhile, business owners can upload their documents to their bookkeeper or accountant using LedgerDocs, or with the latest Dropbox integration, users can sync the two accounts to make sharing documents even easier. They can also take a picture of their receipt using their smartphone at the inception of a transaction. This solves the pain of collecting all those receipts every month in order to maximize tax deductions and keep up to date financial records.

### Uploading Documents is Simple

Clients are able to send their files into the application using their scanner, email, or smartphone, where they are instantly accessible by their bookkeeper and/or

accountant. Alternatively, existing Dropbox users can connect to LedgerDocs for

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stubs, and deposit slips.

## **Search Made Simple**

Users are able to visually search through thumbnail documents within their custom filing cabinet or use the Advanced Search feature to search for files based on document name, tags, or notes. Whether you are looking for a file that was uploaded last night, or from seven years ago, finding important documents with LedgerDocs is simple.

## **Advanced Collaboration Tools**

Lastly, LedgerDocs allows for bookkeepers and accountants to come together with their clients, which helps to streamline the bookkeeping/accounting process and reduce the amount of emails back and forth. Notes, tags, and secure file sharing tools make collaborating on documents simple, while the “member invite” feature gives multiple users the opportunity to access and work on documents.

“We wanted to develop an application that would lower the cost of business for bookkeepers by reducing travel time to clients’ offices while also enhancing the level of service they were providing,” says Wayne Zielke, LedgerDocs CEO. “LedgerDocs does that, and the time it saves bookkeepers allows them to expand their business by taking on more clients.”

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