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Doc.It Connect is a secure portal site that allows accounting firms and clients to share, sign, and manage financial statements, tax returns, invoices, reports, and other documents. Firms implement the Connect portal to drastically reduce the number of hours spent on routine tasks, such as pursuing client files, transferring email attachments and chasing signatures on important filings.

Firms using Connect report that they gain efficiency by working in a shared digital space. They realize savings by reducing document printing, faxing, and mailing. Clients appreciate that they can access documents anytime, from any web-enabled device. The 'always on' nature matches the way we work today, and supports timely completion of filings and projects.

Real-time collaboration:

- Prepared-by-client ‘PBC’ checklists simplify the task of gathering documents for an

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Management Compliance with Regulatory and Legal Requirements

- Customizable site can be branded with the firm logo

eSignatures

- Integration with DocuSign offers a fast, fully digital way to obtain compliant signatures.

Reports

- Audit trail & event log tracks file activity
- Advanced reporting helps track project details, helping to avoid missed deadlines.

Doc.It Connect integrates with Microsoft Office, offering a familiar, intuitive workspace.

Video demo: <https://doc-it.wistia.com/medias/5mlr63p3yj>

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