WHO'S WHO

AMONG THOSE SERVING THE TAX & ACCOUNTING PROFESSION

Doc.It

DOCUMENT MANAGEMENT

Doc.It

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Canada
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Phone:
888-693-6248 (Ext. 1)

Website:
www.Doc-It.com

Number of employees:
25+

Year Founded:
2000

COMPANY OVERVIEW

Doc.It has established a long-standing presence in the market providing a full suite of document management products that meets the needs of firms with 2-300 users due to their leadership philosophy of customer-guided software development. Doc.It has strong financial backing and experienced leadership, which ensures long-term staying power and support for expansion throughout North America. Doc.It's leadership team, with support and guidance from their executive board, believe in strategic growth and maintaining the perpetual culture of customer care.

Doc.It's 5-star award-winning Doc.It Suite, a powerful scalable full suite of document management products for accounting firms, maximizes firm efficiency and effectiveness as accounting professionals gather, process, store, and deliver documents. Doc.It Suite enables accounting professionals and firms to manage documents from multiple sources and applications easily, in one comprehensive and intuitive software application delivering the most efficient and effective method to serve clients.
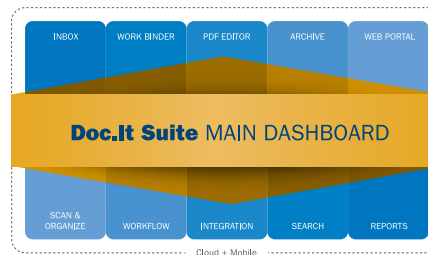
MARKETS SERVED

Accounting firms with 2-300 users throughout North America.

PRODUCTS

The Doc.It® Suite includes:

> Main Dashboard

Doc.It leads the industry with the most powerful and effective workflow and document management interface. With Doc.It's Main Dashboard, everyone has access to work tasks, client Work Binders, documents, the Archive, and a complete set of fully integrated tools.

> Inbox

The Doc.It Suite Inbox is your temporary storage location and routing utility for all printed or scanned PDFs. Documents can be sent to co-workers, Doc.It Work Binders, other binder systems (i.e., CaseWare, fx Engagement) or to the secure Doc.It Archive. The Inbox contains useful utilities for quickly manipulating and assembling PDFs.

> Scan And Organize

Doc.It Suite includes scan and optical character recognition (OCR) support for all types of scanners with built-in features to ensure the accuracy of scanned documents. As documents are gathered, Doc.It's Automatic Forms Recognition (AFR) technology identifies, names and organizes an unlimited number of document types.

> Policy Manager

Doc.It's Policy Manager ensures uniformity across the firm by applying the firm's file naming and retention policy to all documents as they are gathered and then prepared for storage.

> Work Binders

The Doc.It Suite client Work Binders organize documents of all types and formats. Documents are gathered and remain in the Work Binder in their native file format. Work Binders provide staff and partners immediate access to all of the documents needed to complete work tasks.

> Workflow

Doc.It Suite is designed for logical workflow for every engagement type. Doc.It Suite automates workflow by intelligently notifying the next-in-line when a task is ready to be worked on. Doc.It's powerful Main Dashboard interface provides seamless integration with an entire suite of tools. Stay on top of workflow using the all-new Binder Explorer to monitor due dates, route or reroute work and oversee staff workload to resolve bottlenecks when they occur.

> PDF Editor

Doc.It's PDF Editor is used to annotate, bookmark, merge, append and highlight documents. Users can also easily run an electronic calculator tape and apply hundreds of accounting-specific tick marks.

> Document Publishing

When an engagement is complete, Doc. It's publishing tool collects all documents associated with an engagement and combines them into a single fully indexed, bookmarked PDF as a complete record of the finalized engagement. Once published, this PDF is stored in the Doc.It Archive.

> Document Archive

The Doc.It Archive is where firms store fully indexed, bookmarked PDF files, independent of the engagement's originating software. Easily transfer documents from the Archive to clients using the integrated Web Portal or email. Your firm retains complete control of your data, and you are free to change vendors or easily get data out if a partner leaves or if a merger or de-merger happens.

> Cloud + Mobile

Doc.It Suite is cloud-enabled with mobile features allowing access to work and the delivery of client documents anytime, from anywhere. Doc.It's cloud solution ensures your firm benefits from the right-fit cloud solution. Being cloud- and mobile-enabled provides access to conveniently browse and deliver documents while on the go from your laptop, iPad or Android tablet.
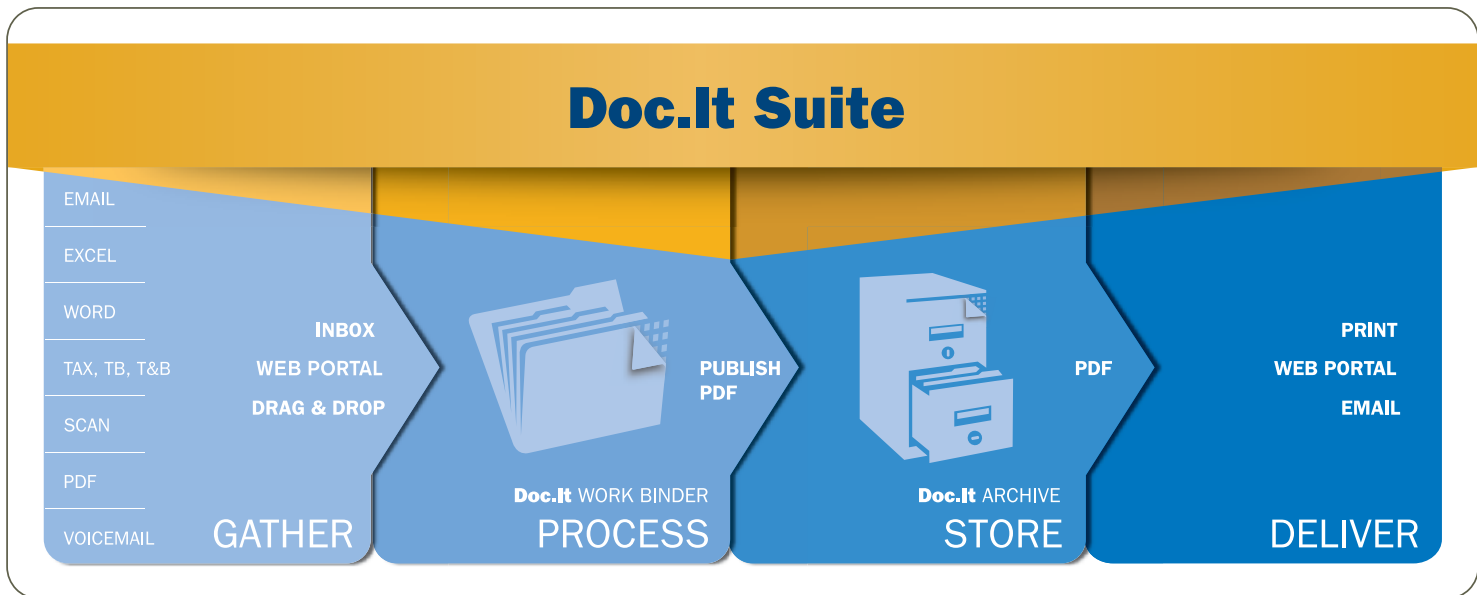
> Web Portal

Doc.It Suite Web Portals give clients secure easy access to documents such as financial statements, tax returns, invoices, large bookkeeping files and any other reports you would like to share and make available to them.

CUSTOMER SUPPORT

Doc.It clients receive professional services and support during the onboarding process and afterwards. Customers are provided with pre-implementation project planning and post-implementation telephone and online support, in addition to free unlimited access to web-based training videos.

Doc.It Suite® MAXIMIZING EFFICIENCY IN ACCOUNTING FIRMS

Doc.It Suite

EMAIL			
EXCEL			
WORD	INBOX		PRINT
TAX, TB, T&B	WEB PORTAL	PUBLISH PDF	PDF	WEB PORTAL
SCAN	DRAG & DROP		EMAIL
PDF		Doc.It WORK BINDER	Doc.It ARCHIVE	
VOICEMAIL	GATHER	PROCESS	STORE	DELIVER

Doc.It Suite is a powerful and scalable full suite of document management products for accounting firms with 2-300 users. Doc.It Suite makes firms more efficient and effective as they gather, process, store and deliver documents. Doc.It Suite is used by over 9,000 accountants in 41 states, 10 provinces and 2 territories.

GATHER

The first step to maximizing efficiency is to streamline the task of gathering documents from any source as they come into the firm. Doc.It Suite ensures documents are identified, named and filed according to firm standards. With Doc.It Suite at work for your firm, documents will consistently be handled in the same manner, named right and filed correctly.

PROCESS

The second step to maximizing efficiency is ensuring all documents supporting a client engagement are well-organized and at your fingertips whenever you need them. Throughout the process of a client engagement, the Doc.It Suite Work Binders provide instant access to all documents necessary to complete work.

STORE

The third step to maximizing efficiency centers on document storage. With Doc.It Suite at work for your firm, the completed engagement and all documents used for it become a single fully bookmarked, searchable PDF that is moved into the Doc.It Archive for storage.

DELIVER

The final step to maximizing efficiency hinges on a firm's ability to efficiently deliver documents the way clients prefer without laboring through a painful or time-consuming search and without any reliance on the document's original application software. Easily and instantly deliver PDF files stored in the Doc.It Archive using Doc.It's fully integrated Web Portal or by email.

CALL TO PREVIEW Doc.It TODAY.

www.doc-it.com I 888-693-6248 (Ext 1)

Doc.It®

CPA Practice Advisor
★★★★★
STAR RATING