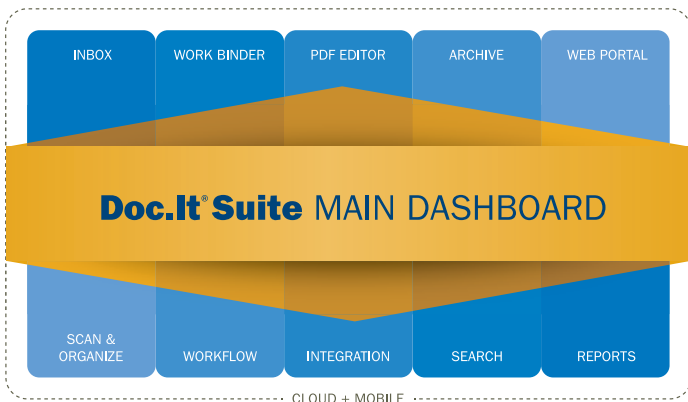


# Doc.It Suite Overview

MAKING FIRMS MORE EFFICIENT AND EFFECTIVE

**Doc.It® is an industry-leading provider of a powerful and scalable full suite of document management and workflow solutions for accounting firms of all sizes. Doc.It Suite makes firms more efficient and effective as they gather, process, store, and deliver documents.**

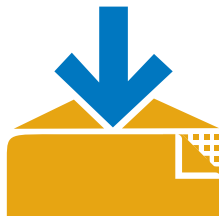


## Main Dashboard

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

## Inbox

The Doc.It 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, the Doc.It Advanced Forms Recognition (AFR) technology identifies, names, and organizes an unlimited number of document types.

## Policy Manager

The Doc.It Policy Manager ensures uniformity across the firm by applying the firm's file naming and location 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 launched from within the Doc.It Work Binder in their native file format. Doc.It Work Binders provide staff and partners immediate access to all of the documents needed to complete work tasks.

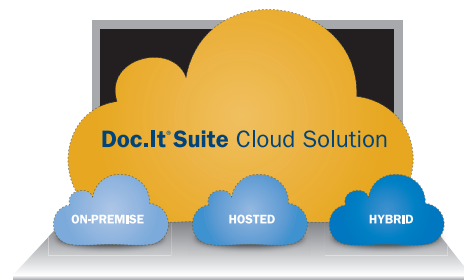


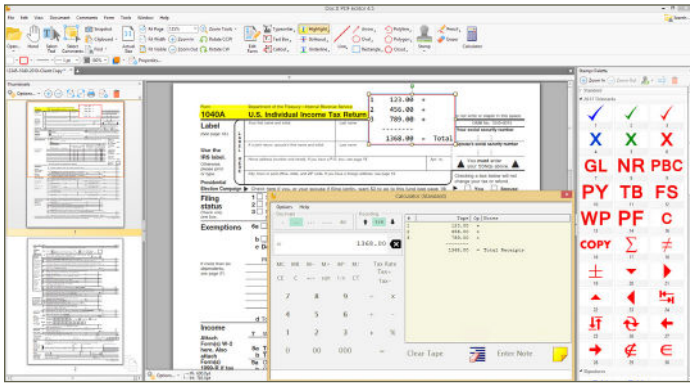
## Workflow

Doc.It Suite is designed for workflow for every engagement type. Doc.It Suite automates workflow by showing the status of a document or binder which informs the next-in-line a task was completed. The powerful Main Dashboard interface provides seamless integration with an entire suite of tools. Stay on top of workflow using the new Doc.It Binder Explorer to monitor due dates, route or reroute work, and oversee staff workload to identify issues before they occur.

## Cloud+ Mobile

Doc.It Suite is cloud-enabled with mobile features allowing access to work and the delivery of client documents anytime, from anywhere. Being cloud- and mobile-enabled provides access to conveniently browse and deliver documents while on the go from your laptop, iPad, or Android tablet.





## PDF Editor

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

## Document Archive

The Doc.It Archive is where firms store fully-indexed, bookmarked PDF files, independent of the engagement's originating software. Easily send a copy of any document from the Doc.It Archive to clients using the integrated Doc.It Web Portal or email. Your firm retains complete control of your data, and you can easily migrate your data should you change vendors or if a partner leaves.

## Document Publishing

When an engagement is complete, the Doc.It publishing tool makes a PDF snapshot of all documents associated with an engagement and combines them into a single fully-indexed, bookmarked PDF as a complete record of the finalized engagement. Published PDFs are managed in the Doc.It Archive.



## Search

Browsing Doc.It Work Binders and Doc.It Archive is the quickest method of finding documents. In instances where multiple documents must be reviewed in order to find a specific document, users enter specific words or key phrases and powerful search by Doc.It instantly reveals the most reasonable selection of documents for review.



## Web Portal

Doc.It 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. Clients can also send files to you for processing. The Doc.It Web Portals also allow the ability to send encrypted links for one-off files via email and the ability to send client document request lists.

## Reports

Doc.It Suite has easy-to-use custom report generators for the management and export of data to the user's monitor, Excel or .CSV file. Customized reports can be saved and reused in the future.



## Doc.It Go

Doc.It Go, the Doc.It Suite mobile app, is engineered to work in conjunction with Doc.It Suite. Everybody can be anywhere and work can continue using any device.

## E-Signatures

Doc.It makes it easy to get documents signed from clients (such as an IRS Form 8879) with our DocuSign integration.

## Seamless Integration

Doc.It integrates with all tax, time & billing and work paper software, including CaseWare® and CCH ProSystem fx® Engagement.

# Doc.It®

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