

# Doc.It Explore

EASY AND AFFORDABLE DOCUMENT MANAGEMENT FOR ACCOUNTING FIRMS

**Accounting firms of all sizes are gaining efficiency and productivity by implementing document management systems.**

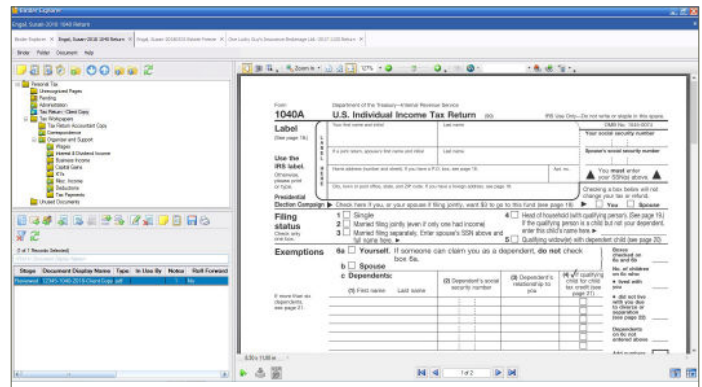
Your accounting firm or bookkeeping service could improve operations by reducing paper. But the document management systems you have considered seem expensive, complex, difficult to implement, and a time sink for your team.

Doc.It Explore was designed for you. Explore is a simple and intuitive document management system that's easy to implement, easy to use, and only costs slightly more than what you might be paying for Adobe Acrobat DC. Think of it as your 'digital workspace' for all types of engagements.

**DOC.IT EXPLORE GIVES YOU THE POWER TO GET ORGANIZED RIGHT AWAY, WITH THESE GREAT TOOLS:**

## Document Management

- Work Binders** keep client documents organized in the way you prefer to work.
- Store any file type** – accommodates any file size or format and allows you to gather files from all sources.
- Check-In/Check-Out** allows multiple colleagues to work on the same document at the same time.
- Retention Policies and purge manager:** Set retention policies and file purge management in compliance with statutory requirements, litigation obligations, and business needs.
- Customizable folder templates** ensure consistency across all related projects and allows your firm to work the way you want to work.
- Document scanning interface and OCR:** quickly capture searchable digital files from paper.
- Fast, flexible search:** find any document fast.



## Binder Explorer at Work in Your Firm

1. Different folder structure for different engagement types.
  2. Click a folder and documents in the folder are listed here.
  3. Complete functions according to due dates.
  4. Click, drag, and drop a tab to tear it off and place it on a second monitor.
- Open several Doc.It Work Binders at one time

**Doc.It**<sup>®</sup>

info@doc-it.com | www.doc-it.com  
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United Kingdom  
4th Floor, Euston House  
24 Eversholt Street  
London, NW1 1AD, UK

00 1 888 693 6248  
00 1 905 547 1100

Global Headquarters  
1425 Cormorant Drive, Suite 201  
Ancaster ON L9G 4V5  
Canada

888.693.6248  
905.547.1100

USA  
7848 W. Sahara Ave.  
Las Vegas, NV 89117  
USA

888.693.6248  
905.547.1100

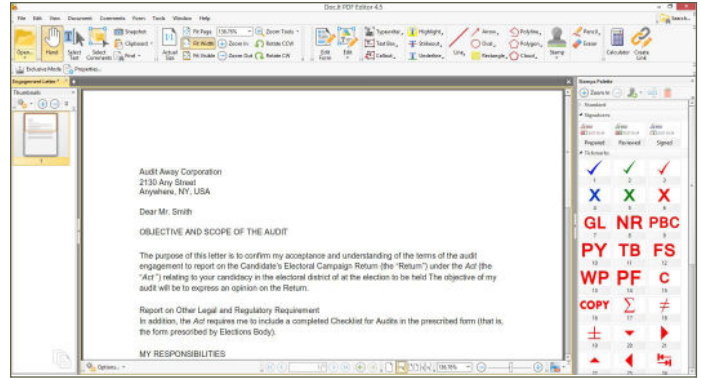
- ✓ **Powerful PDF editor** tailored for accountants - annotate, bookmark, merge, link pages, append, and highlight documents – right in your Doc.It work area.
- ✓ **Tick marks and stamps:** tools to mark up documents replaces highlighters and stamps on paper.
- ✓ **Digital Signature support:** easily sign PDF documents without printing, signing and scanning files.

## Reports

- ✓ **Audit trail & event logs** inform you when new files have been added, downloaded, or changed.
- ✓ **Advanced reporting** helps you track project details, helping to avoid missed deadlines. Create a report, for example, listing all binders that have been finished for Personal Tax.

## Fit with Your Existing Systems

- ✓ **Integrates with Microsoft Office**, offering a familiar, intuitive and efficient workspace.



## PDF Editor at Work in Your Firm

1. Markup and annotation tools.
  2. Calculator tape can paste to document.
  3. Thumbnail, bookmark and comment panes.
  4. Quickly reorganize pages in a PDF file. When previewing a PDF file, simply click on a page in the left pane, then drag and drop it into the desired location in the PDF document.
- ✓ Doc.It PDF Editor is Adobe-compliant

## DOC.IT TRAINING AND SUPPORT

Like all Doc.It products, Connect is very easy to use. With Connect you can be up and running, sharing documents with clients very quickly. A group of accountants, software and security experts on the Doc.It team are at your side for implementation, training, and provide training, tips and support as long as you use the product.

## GROW AT YOUR OWN PACE

No dead ends. Doc.It Explore will free your time to build customer relationships, so expect your firm to grow. When you're ready, easily expand capabilities with an upgrade to Doc.It Suite.



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**United Kingdom**  
4th Floor, Euston House  
24 Eversholt Street  
London, NW1 1AD, UK

00 1 888 693 6248  
00 1 905 547 1100

**Global Headquarters**  
1425 Cormorant Drive, Suite 201  
Ancaster ON L9G 4V5  
Canada

888.693.6248  
905.547.1100

**USA**  
7848 W. Sahara Ave.  
Las Vegas, NV 89117  
USA

888.693.6248  
905.547.1100