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Doc.It Suite

www.Doc-It.com

Doc.It was awarded a 2013 Innovation Award based on numerous Doc.It Suite innovations during the last 18 months, evidence of their perpetual commitment to research and development to help accounting firms standardize and ease document management with workflow.

Doc.It recognizes firms make choices to work with a broad range of products resulting in an ecosystem based on firm size, personal preference, services offered and technologies employed by the firm. The natural mix of different products, services, and technologies is mainstream in the profession as firms of all sizes strive to manage the right balance of cost for a solution to value received from a solution.

Ultimately, the success of Doc.Its business revolves around understanding and supporting the ecosystem of every firm and the processes that drive their businesses. Doc.It Suite is continually evolving to support the needs of public accounting firms as they are anticipated and arise.

Doc.It has delivered the following innovative enhancements during the last 18 months:

- Workflow
- Web Portal
- Cloud and mobile enabled
- PDF Editor
- Publishing
- Main Dashboard

- Search CapabilitiesReporter

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system. Projects can quickly move through stages of completion and from person to person through an intuitive interface.

*****New*** Web Portal**

Doc.It makes sharing documents with clients hassle-free via the Doc.It Web Portal. The all new Web Portal allows firms to circumvent traditional mail resulting in significant reductions in timelines.

*****New*** Cloud and mobile enabled**

Doc.It is cloud enabled, allowing firms to access to documents from anywhere in the world. Users can access Doc.It Suite via Android or iPad tablet, delivering a truly portable experience.

*****New*** PDF Editor**

Doc.It Suite incorporates an all new full-featured PDF Editor including bookmarking, annotating, editing and mark-up of documents. Additionally, when a document is in high demand, it can be viewed by multiple users while protected from conflicting changes. Collaboration on documents, work binders and clients is enhanced through a universal notes system.

*****New*** Publishing**

When an engagement is complete, Doc.Its all new 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.

*****New*** Main Dashboard**

Doc.It leads the industry with its all new Main Dashboard, the most powerful and effective workflow and document management interface. Using Doc.Its Main

Dashboard, everyone has access to work tasks, client Work Binders, documents, the

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*****New*** Binder Explorer**

Doc.It Suite all new Binder Explorer allows users to manage projects and access documents efficiently from one screen. Users have a single central interface that provides access any document in the Inbox, Work Binder, or Archive from one screen.

Technology

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