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TECHNOLOGY

Tools To Enhance Or Supplement Your Core Document Management System

The evolution of document management systems has created a market of additional software and services that enhance or supplement the core document management application.

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AccountantsWorld

Cyber Cabinet

www.accountantsoffice.com

Accountants Office Online is a suite of accountant-centric applications that can be accessed through a secure online portal. Included with the suite is Cyber Cabinet, a simple, secure and effective way to store and share documents with clients. The system can be used to store tax returns, financial statements, and other documents in a completely secure environment. Clients can log in and view or print the items the accountant makes available to them, eliminating the need for faxing, printing and mailing most documents.

AttachPlus

www.attachplus.com

This utility program is designed to enhance the security of document distribution via e-mail. The concept is that you can “print to e-mail and encrypt” documents for e-mail distribution with 128-bit encryption and zip technology. The software integrates as an add-on to most software applications including tax, document management, MS Office, Outlook, etc. This is another way to help improve the security and confidentiality of the transfer of electronic files via e-mail.

CCH, a WoltersKluwer business (formerly owned by DocuMatters, LLC)

BOCDIP

www.bocdip.com

BOCDIP is an application that is designed specifically to help automate the process of organizing the data you receive from your clients. Using a proprietary data dictionary and database engine, it will automatically take a pile of unsorted client information, determine what each item is, and output organized documents to a single organized and bookmarked *.PDF file. This can be a valuable supplement to document management systems that are weak in the scanning and organizing task.

Crimson Tree Software

Libris K-1

www.crimsontreesoftware.com

Libris K-1 is a unique archival and management tool that extracts, searches, sorts, collates and packages K-1s and related documents from *.PDF-formatted tax returns exported from either the ProSystem fx Tax or GoSystem software applications. Libris K-1 minimizes the administrative labor costs related to producing, organizing and distributing large volumes of tax documents.

DoubleSight Displays, LLC

www.doublesight.com

One of the hottest trends in technology for the tax and accounting profession has been the deployment of dual screen configurations to help facilitate the transformation to paperless workflows. One screen is typically used to work in the

software application and the other to view scanned images from the document management system. Another use is to keep your Outlook window open on one screen to view your e-mail, lookup contacts and schedule appointments, and use the other screen to run an application. Or perhaps you want look at two sections of the same spreadsheet side by side. The bottom line is that dual screens can provide a real productivity boost.

DoubleSight Displays, LLC is focused on bringing dual-screen technology to the marketplace by specializing in this niche. They have three categories of product offerings: ergonomically designed dual-screen configurations with a single “all in one” adjustable stand, an offering of large plasma display screens ranging in size from 42” to 60”, and a laptop card called VTBook that allows you to plug in a dual-screen display configuration.

Novel Labs, Inc.

ShareFile

www.sharefile.com

ShareFile is a web-hosted file transfer utility that allows you to transfer and store electronic files through your firm’s web site. This can be useful for your clients to upload their QuickBooks files, scanned copies of their raw tax data and for you to post copies of *.PDF and other files that you want to distribute to them without going through e-mail.

This service can be completely custom branded to match your web site design colors and logos so that it blends in seamlessly.

SurePrep, LLC

SurePrep Express

www.sureprep.com

SurePrep Express is a hybrid solution that automates the workpaper organization process, with an option to outsource that function or use your internal administrative staff. It is a web-based application designed to push work down to the lowest level of personnel and free up the time of your reviewers, while allowing firms to improve the accuracy and quality of the return.

SurePrep Express has an Electronic Review system that eliminates the need to tick and tie numbers, allows preparers to perform much of the review, tracks the review

process to assure that everything has been reviewed and includes an electronic review notes tool for communicating issues between preparers and reviewers. The end product is the DreamWorkpapers, a complete set of electronic leadsheets and reconciliation workpapers that are hyperlinked to the source documents, making it easier to find the source document for which you are looking.

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