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tax, time and billing, and other software programs to a designated Doc.It User Inbox, a folder in a Doc.It Work Binder or to the client's Archive.

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Document management and workflow provider Doc.It has announced new Doc.It Suite AutoFiling, Doc.It Time and Billing Integration and Doc.It Workflow enhancements.

Doc.It Suite product development is heavily influenced by Doc.It's user-base. "We view customer-guided product development as an important extension of our

award-winning customer care,” said Brock Philp, President and CEO, Doc.It. The

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tax, time and billing, and other software programs to a designated Doc.It User Inbox, a folder in a Doc.It Work Binder or to the client's Archive.

- Autofile any PDF document (e.g. tax, time and billing, and other software programs).
- Autofile one-off documents being handled at the accountant level and large batches of documents such as invoices or tax returns being run by administrative staff.
- Doc.It's Autofiling automatically applies the policy (document name, folder location and retention management) to each PDF, ensuring firm-wide standardization.
- Doc.It's Autofiling is customizable. Set up the rules when you initially configure the feature, adjust when needed and clone for similar documents.
- Doc.It's Autofiling integrates with all applications. Choose your preferred or best-of-breed applications from any vendor and Doc.It's Autofiling will provide integration. You are no longer required to rely on one vendor to ensure everything works together.
- Doc.It's Autofiling saves time and results in accurate filing.
- Easily reference all filing activity using the autofiling built-in Log.

TIME & BILLING INTEGRATION

Doc.It's Time & Billing (T&B) integration ensures practice management software integrates with Doc.It Suite. Contact Doc.It to discuss the integration of your T&B software.

How Doc.It Time & Billing Integration Works:

- Any creation or modification of a client in your T&B software results in an automatic update to that client information in Doc.It.

- The integration between your T&B software and Doc.It includes a connection to

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- **Workflow Groups.** Create a group of users who will work on a project with concurrent tasks. Budgets may be entered by the project lead. Time is tracked by users and reporting provides a status of each project and actual costs.
- **Scheduling:** Administrators plan resources (personnel) tied to engagements and users view their work for a given period of time. Firm leadership monitors where resources are under-, or over-utilized and adjust accordingly.
- **Due-date Tracking**

ü View projects and their status versus each project's due date.

ü Monitor and adjust staff resources by project to ensure projects are completed on time.

ü Create automated due-dates using a table created by the firm, based on due-date rules set by the firm.

ü When moving a Workflow to the Next Step or Previous Step, due-dates are automatically calculated.

Accounting • Technology

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