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ACCOUNTING & AUDIT

Doc.It Connect – 2019 Innovation Award Finalist

Jul. 24, 2019



Doc.It Connect is a secure portal site that allows accounting firms and clients to share, sign, and manage financial statements, tax returns, invoices, reports, and other documents. Firms implement the Connect portal to drastically reduce the number of hours spent on routine tasks, such as pursuing client files, transferring email attachments and chasing signatures on important filings.

Firms using Connect report that they gain efficiency by working in a shared digital space. They realize savings by reducing document printing, faxing, and mailing. Clients appreciate that they can access documents anytime, from any web-enabled device. The 'always on' nature matches the way we work today, and supports timely completion of filings and projects.

Real-time collaboration:

- Prepared-by-client 'PBC' checklists simplify the task of gathering documents for an audit or project
- Secure file sharing & encryption reduce data security risks that are rampant with email and paper file sharing.
- Work Binders keep client files organized
- Store any file type – accommodates any file size or format
- Check-In/Check-Out multiple colleagues can work on the same document at the same time.
- Retention policies & purge manager: Set retention policies and file purge management in compliance with regulatory and legal requirements
- Customizable site can be branded with the firm logo

eSignatures

- Integration with DocuSign offers a fast, fully digital way to obtain compliant signatures.

Reports

- Audit trail & event log tracks file activity
- Advanced reporting helps track project details, helping to avoid missed deadlines.

Doc.It Connect integrates with Microsoft Office, offering a familiar, intuitive workspace.

Video demo: <https://doc-it.wistia.com/medias/5mlr63p3yj>

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