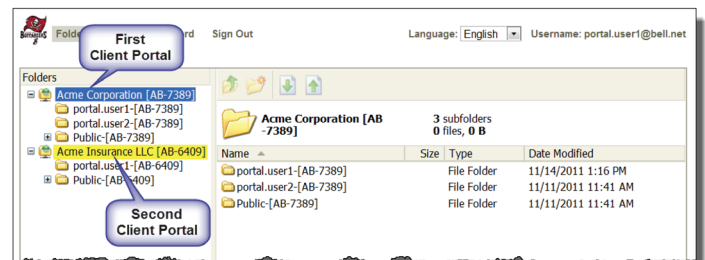


Why Doc.It .NET Client Portal? The Doc.It .NET Client Portal system provides a web-based platform facilitating secure file transfers to and from Doc.It customers and their clients. The Doc.It .NET Client Portal system 1) allows for the exchange of files of any size with clients, 2) transmits client data securely over an encrypted connection while improving efficiency of client communications, and 3) ensures client data is maintained in accordance with industry and government regulatory compliance.

DOC.IT .NET CLIENT PORTAL system is hosted internally on the Doc.It customer's own hardware, keeping their most valuable asset on-site. The Doc.It Suite .NET Client Portal system includes:

- .NET Portal server used to store client files;
- .NET Client Portal website used by the clients to upload and download files over a web browser secure connection;
- .NET Client Portal Manager program used by the Doc.It customer to create and manage files and folders within the client portals; and
- A full set of training videos.



THE CHALLENGES DOC.IT SUITE .NET CLIENT PORTAL SOLVES

- **Email File Size Limitations:** Most email systems impose a 10 MB file attachment size limit. Files larger than 10 MB will be rejected by most email servers in order to reduce web traffic and maintain an acceptable level of Internet performance.
- **Email Security Limitations:** Email systems cannot transmit data securely unless the sender and receiver are both on a "closed" system. Therefore almost all email is transmitted unencrypted, making it vulnerable to interception by unauthorized parties.
- **Industry & Government Regulatory Compliance:** As the storage and transmission of sensitive client data over the Internet becomes increasingly necessary, privacy laws have been enacted to protect client data from misuse and theft. Systems must ensure that all client data is maintained and transmitted in a secure manner in accordance with government and industry compliance.



THE BENEFITS OF DOC.IT .NET CLIENT PORTAL

MULTI-OFFICE SUPPORT - Doc.It customers with more than one office location are able to service all offices and their respective clients with a single Doc.It .NET Client Portal server installed at any one office location.

MULTI-COMPANY SUPPORT – Portal clients of the firm with multiple business entities can access all entities from a single portal login.

WEB PORTAL CONCEPTS - The Doc.It .NET Client Portal system provides a web-based platform facilitating secure file transfers to and from Doc.It customers and their clients.

- **CLIENT PORTALS** - Client files are stored in separate containers called client portals, with security to control access to data. Users can upload and download files to and from the client portals.
- **CLIENT PORTAL USERS** – Access to the client’s portal is controlled by a unique logon and password to the Portal website through a web browser.
- **CLIENT PORTAL FILES** - Files of any type, from large QuickBooks files to Word documents, can be uploaded, downloaded and viewed within a user-definable hierarchical folder structure.
- **CLIENT PORTAL FOLDERS** - Client portal files are maintained in client portal folders. Client portal folders can be private to an individual or shared amongst all users of that client’s portal.
- **CLIENT PORTAL FOLDER TEMPLATES** – Client portals can be quickly created by the Doc.It customer using predefined folder structures for any type of client.

WEB PORTAL FAQs

CAN YOUR CLIENT PERFORM USER-MAINTENANCE ON THE CLIENT PORTAL THEMSELVES? Users can update their passwords, add folders, rename and delete documents. For now users are all controlled from the “firm” side. We will add the ability for the “client” to manage their own users in a later version.

HOW LARGE CAN FILES BE FOR UPLOADING TO THE CLIENT PORTALS? 4GB per file.

IS THE DOC.IT CLIENT PORTAL FULLY INTEGRATED WITH DOC.IT SUITE? Yes. Client Portal features can be found in all modules of Doc.It Suite. The Doc.It Client Portal can be brought into the various elements of Doc.It Suite and files can be transferred from the modules of Doc.It Suite to the Client Portals.

HOW ARE FILES FROM WITHIN DOC.IT SUITE UPLOADED TO CLIENT PORTALS? Files can be selected from within the Doc.It Archive, Binders, Inbox or Windows and uploaded directly into the selected client’s portal folders. Alternatively, the Doc.It .NET Portal Manager allows all of the same upload operations to be performed within an intuitive user interface.