

Real-Time Reports

Doc.It® Suite real-time reports are instantly at your fingertips while working in Binder Explorer. Sort by partner, project status, due date, or any criteria and instantly report on the status of work. The powerful report generator from Doc.It allows your team to produce and share detailed management reports as MS Excel or .CSV files.

- Create custom reports based on a number of pre-created report views.
- Select fields to include in the reports.
- Specify sort-order based on one or multiple fields.
- Specify filter criteria to focus the report on a certain data subset.
- Save and name the report for future use.
- Make the report 'Shared/Public' with other users at the firm.
- Export the report to Excel for use with charts and graphs.
- Export the data to .CSV format which can then be imported into other software.



Client Type	Client Name	Client #	Binder Name	Year	Notes	Binder State	Assigned User	State Due	Binder Due
Corporate	ABC Telecom	9	Entity Tax 2012	2012		Assembly			
Corporate	ABC Telecom	9	Entity Tax 2011	2011		Complete			
Corporate	ABC Telecom	9	Client Misc.	2012		Not Started			
Personal	Adams, Andrew	453	Personal Tax 2012	2012		Needs Sign Off	BSMITH	2013-02-26	
Personal	Adams, Andrew	453	Personal Tax 2011	2011		Complete			
Personal	Adams, Andrew	453	Client Misc.	2012		Not Started			
Corporate	Arlesdale Railway	69	Entity Tax 2012	2012		Not Started			
Corporate	Arlesdale Railway	69	Entity Tax 2011	2011		Complete			
Corporate	Arlesdale Railway	69	Client Misc.	2012		Not Started			
Personal	Edwards, Amelia	457	Personal Tax 2012	2012		File Preparation	BSMITH		
Personal	Edwards, Amelia	457	Personal Tax 2011	2011		Complete			
Personal	Edwards, Amelia	457	Client Misc.	2012		Not Started			
Personal	Hayes, Chris	401	Personal Tax 2012	2012		Needs Sign Off	BSMITH	2013-02-26	
Personal	Hayes, Chris	401	Personal Tax 2011	2011		Complete			
Personal	Hayes, Chris	401	Client Misc.	2012		Not Started			
Personal	Lewis, Angela	425	Personal Tax 2012	2012		Scan	BSMITH		
Personal	Lewis, Angela	425	Personal Tax 2011	2011		Complete			
Personal	Lewis, Angela	425	Client Misc.	2012		Not Started			
Personal	Smith, David	397	Personal Tax 2012	2012		Needs Sign Off	BSMITH	2013-02-26	
Personal	Smith, David	397	Personal Tax 2011	2011		Complete			
Personal	Smith, David	397	Client Misc.	2012		Not Started			
Corporate	Wallaby Airlines	13	Entity Tax 2012	2012		Not Started			
Corporate	Wallaby Airlines	13	Entity Tax 2011	2011		Complete			
Corporate	Wallaby Airlines	13	Client Misc.	2012		Not Started			
Corporate	Wayne Enterprises	5	Entity Tax 2012	2012		File Review			
Corporate	Wayne Enterprises	5	Entity Tax 2011	2011		Complete			

Doc.It Suite Workflow in Your Firm

- Instantly view status of all active projects.
- See the status of all engagements related to a client.
- Check the status of an engagement project.
- Open and view multiple Work Binders on multiple screens.
- View dates and history of activity.
- Search for documents.