

# Scan and Organize

**Doc.It® Scan and Organize makes every scanned document fully searchable with optical character recognition (OCR) technology allowing you to quickly search and locate any file. Doc.It scan and organize tools enable easy scanning whether in the office or in the field.**

## Doc.It Scan and Organize Works in Three Easy Steps

1. Scan documents with your scanner.
2. The Doc.It Automatic Form Recognition (AFR) identifies and automatically names and files documents into the correct folder for you.
3. Documents are moved from the Doc.It Inbox into the client's Work Binder folder.

**Firms may transition to a digital office in stages as their needs mature, starting with no scanning, then post- and pre-process scanning.**

- ✓ **PRE-PROCESS SCANNING:** Leverage an administrative staff member to scan and organize documents up-front so everything is digital and organized when a staff member or accountant starts working on a file.
- ✓ **POST-PROCESS SCANNING:** Scan relevant paper documents at the end of an engagement.



## This is how Doc.It Suite Scan and Organize Helps Accounting Professionals

- ✓ **ENSURES SYSTEMATIC ORDERLY INTAKE OF DOCUMENTS OF ALL TYPES.** Doc.It AFR recognizes hundreds of different document types as they are moved from the scanner into the Inbox, ensuring each document is assigned the proper naming conventions. Doc.It has the only forms recognition tool that allows user to customize their environment by setting up your own document naming conventions and adding additional forms to the recognition library. Doc.It has tools like Scan Separators to improve bookmarking and separations within the various documents.
- ✓ **ALL SCANNED AND ORGANIZED DOCUMENTS BECOME TEXT SEARCHABLE.** Once documents are scanned and organized they become text searchable which ensures staff and partners can easily search by client name or another key word located anywhere on the document to quickly locate a document in the digital Work Binder system.
- ✓ **STREAMLINES DIGITAL DOCUMENT WORKFLOW.** Once scanned and organized, documents are moved into a client's Work Binder where they are easily and instantly accessible. With a computer and Internet connection, access to all documents from anywhere and at anytime is possible.