

# Workflow

Integrate Source Documents into an Automated Logical Workflow

**Doc.It® Suite Workflow is used to track status as soon as documents stream into your firm from any source. Documents enter your firm and are moved into Doc.It Suite through the integrated Web Portal, the Inbox (email), or with the simple action of drag and drop into a client's Doc.It Work Binder. There is never a stoppage in work because documents are centrally located and always filed and named correctly. Workflow continues through and beyond the completion of an engagement as users easily deliver documents from the Doc.It Archive wherever and whenever needed using the integrated Doc.It Web Portal or email.**

## This is how Doc.It Suite Workflow Operates for Staff and Partners

Doc.It Workflow begins when documents stream into your firm from any source. Doc.It Suite ensures documents are placed in the correct client Work Binder, the location where all preparation and review work is carried out.

Doc.It Workflow continues as staff and partners begin each workday on the Doc.It Main Dashboard screen to review Work Binders and documents assigned to them. When a task is complete, the project status is changed, which makes it easy for everyone to stay on top of workflow. With the Doc.It Main Dashboard it is easy for partners to quickly check the status of engagement projects, route or reroute work, and efficiently monitor staff workload to identify issues before they occur.

Doc.It Workflow continues through the completion of a client engagement and the delivery of documents to the client. When an engagement is complete, Doc.It Suite is used to lock down a dynamic engagement binder and all documents supporting the work by publishing them to PDF and moving this into the Doc.It Archive for storage. The resulting fully-bookmarked, searchable PDF retains its integrity over time, is easily shared, and simple to access independent of the applications used to create the original document. Documents stored in the Doc.It Archive are easily and instantly delivered to a client using the Doc.It integrated Web Portal or by email.

The screenshot shows the 'Binder Explorer' window with a table of client engagements. The table has columns for Client Type, Client Name, Client #, Binder Name, Year, Notes, Binder Status, Assigned User, State Due, and Binder Due. Three callouts are present: 1 points to the 'Binder Status' column, 2 points to the 'State Due' column, and 3 points to the 'Notes' column.

Client Type	Client Name	Client #	Binder Name	Year	Notes	Binder Status	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	BSMTH	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			
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	BSMTH	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	BSMTH		
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	BSMTH	2013-02-26	
Personal	Smith, David	397	Personal Tax 2011	2011		Complete			
Personal	Smith, David	397	Client Misc.	2012		Not Started			
Corporate	Walshy Airlines	13	Entity Tax 2012	2012		Not Started			
Corporate	Walshy Airlines	13	Entity Tax 2011	2011		Complete			
Corporate	Walshy 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

1. Instantly view status of all active projects.
  2. See the status of all engagements related to a client.
  3. 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.

**Doc.It®**

7848 W. Sahara Ave.  
Las Vegas, NV 89117

1425 Cormorant Drive, Suite 201  
Ancaster ON L9G 4V5

888.693.6248 or 905.547.1100  
info@doc-it.com | www.doc-it.com

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