

# Doc.It Connect

PUT AN END TO THE PAPER CHASE WITH A SECURE WEB PORTAL.

**How many hours per week does your team spend pursuing client files, transferring email attachments and chasing signatures on important filings? How many client requests come in requesting copies of documents residing on your server or file room?**

Now you can save those hours, and offer clients a convenient option for sharing, signing and securely storing documents. 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. Gain efficiency with an integrated digital workspace for non-trial balance work.

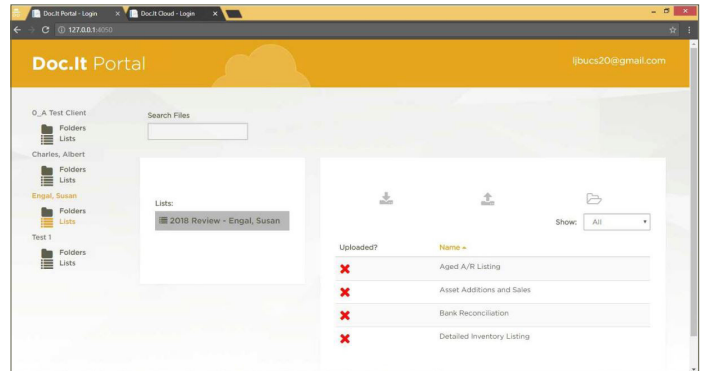
Connect provides Work Binders, an engagement facility, that keeps everything organized as you work on and review client assignments. Documents are accessible anytime, from any device. Integration with industry-leading DocuSign eSignature assures a streamlined, compliant signature process.

Grow in your role as trusted advisor by creating a branded storehouse of documents, checklists and client educational content in a private shared site that enhances clients' experience and perception of your firm.

## THE ADVANTAGES OF DOC.IT CONNECT OVER OTHER FILE STORAGE AND SHARING SITES:

### Document Management

- ✓ **Work Binders** keep client files organized in the way you prefer to work.
- ✓ **Store any file type** – accommodates any file size or format and allows you to gather files from all sources.
- ✓ **Check-In/Check-Out** allows multiple colleagues to work on the same document at the same time.
- ✓ **Retention policies & purge manager:** Set retention policies and file purge management in compliance with statutory requirements, litigation obligations, and business needs.
- ✓ **Customizable folder templates** ensure consistency across all related projects and allows your firm to work the way you want to work.



Clients and accountants can share, sign, and manage financial statements, tax returns, invoices, reports and other documents in the secure portal.

**Doc.It**®

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## Portal

- ✓ **Portal** home page is fully integrated and can be branded with your firm logo.
- ✓ **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.

## eSignature Integration

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

## Reports

- ✓ **Audit trail & event log** inform you when new files have been added, downloaded, or changed.
- ✓ **Advanced reporting helps you track project details, helping to avoid missed deadlines.** Create a report, for example, listing all binders that have been finished for Personal Tax.

## Fit with Your Existing Systems

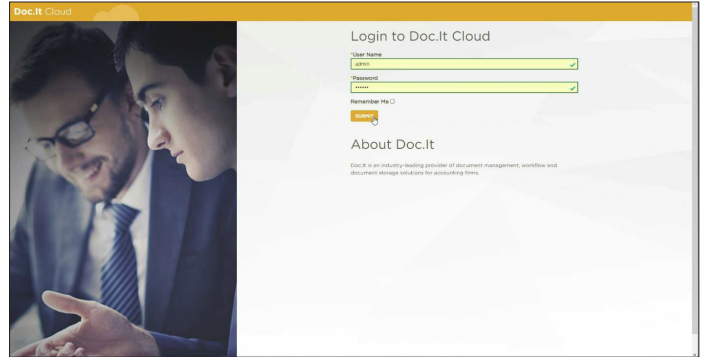
- ✓ **Integrates with Microsoft Office**, offering a familiar, intuitive and efficient workspace.

## DOC.IT TRAINING AND SUPPORT

Like all Doc.It products, Connect is very easy to use. With Connect you can be up and running, sharing documents with clients very quickly. A group of accountants, software and security experts on the Doc.It team are at your side for implementation, training, and provide training, tips and support as long as you use the product.

## GROW AT YOUR OWN PACE

No dead ends. Doc.It Connect will free your time to build customer relationships, so expect your firm to grow. When you're ready, easily expand capabilities with an upgrade to Doc.It Suite.



Create your own firm portal site, where clients can securely log in to upload tax, financial and other documents.

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