Productivity Suite – Doc.It by IRIS

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Introduction

- **Who and what is Doc.It?**

- **Need for technology with the staffing crunch**

- **There is no one silver bullet to make us more productive**
  - Sum of many small pieces add up to marked increase in efficiency

- **How can Doc.It's Suite help with this?**

Cloud Technology

- **Connectivity**

- **Focus on doing what accountants are good at**
  - Leave the technical to others

- **Doc.It can run as a SaaS cloud product or on-premise / hosted**

Scan

- **Scan directly to an engagement or into the long term storage**

OCR and Indexing

- Every scanned PDF is OCR'd
  - Editable and can be made searchable

- Every PDF entering the system is checked to ensure that it has a text layer
  - If required, the file is OCR'd

- All files are indexed as the enter the system
  - Drives into our search engine in real time
  - Every word of every document is natively fully searchable

IRIS. Look forward

Advanced Forms Recognition

- **Scan – OCR – Index – Search**
  - Name and identify tax documents
  - Automatically file them into the correct location

Everything in One Place!

- **Everything about a client in one place**
  - **Work, Review, Store, Service Clients, Access Portal & Workflow; all on one screen!**

Template driven Engagement Software

- **Consistency, create or roll forward 1,000's of engagements at a time**

Integrated workflow

- **Never miss a deadline!**

- **Always aware of a project's status**
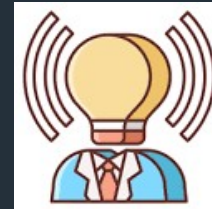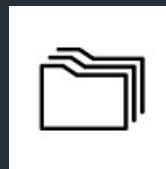
- **Easier to manage**

- **Multiple workflow templates**

Integration with common tools
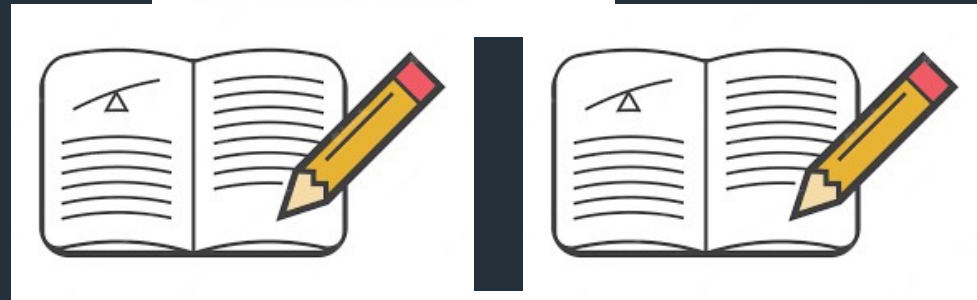

- **Outlook**

- **Portal**

- **CaseWare**

- **DocuSign**

Notes

- Client

- Engagement

- Engagement documents

- Portal documents

- Can roll forward notes!

Who loves to file documents?

- Let the system file tax returns, invoices, financial statements, completed engagements… for you!

Archival Storage

- Secure

- Retention Management

Secure Document Transmittal

- Portal

- PBC Lists

- Secure Email

Summary:

Productivity via Doc.It by IRIS

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