

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 they enter the system
 - Drives into our search engine in real time
 - Every word of every document is natively fully searchable



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!**

Binder Explorer

Binder Explorer x Engal, Susan 10015.01-Archive x

Binder Help Clients (F6) x Engal, Susan 10015.01 - Individual - Ancaster Saved Searches (F7)

(1 of 6 Records Selected)

<Find in Client Name>

Client Name /	Binder Name /	Type	Notes	Issues	Client ...	Year	Partner	Binder Category	Priority	Period ...	Binder Stage	Assigned ...	Extended	Binder Start...	Binder Due	Stage Start ...	Stage Due	Client Group	Orig. Est. ...	Client #
Engal, Susan 10015.01	2023 Bookkeeping	Work	3		1	2023	Don Emery	Bookkeeping	2	12/31	Review	RNOACK	No	2019-10-22 15...	2023-09-30	2022-04-19 16...		Engel	24h 0m	12345
Engal, Susan 10015.01	2023 Personal Tax US	Work			1	2023	Don Emery	Personal Tax	2	12/31	Tax - File Preparation	Don Emery	No	2023-09-21 15...	2024-04-15	2023-09-21 15...		Engel	0m	12345
Engal, Susan 10015.01	20230801 Refinancing	Work	2		1	2022	Don Emery	Client Project	2	12/31	Plan	Professiona...	No	2020-06-02 11...	2023-10-08	2023-08-08 12...		Engel	0m	12345
Engal, Susan 10015.01	Archive	Archive			1	2013	Don Emery		3	12/31			No					Engel	0m	12345
Engal, Susan 10015.01	Client Inbox	Inbox			1	2013	Don Emery		3	12/31			No					Engel	0m	12345
Engal, Susan 10015.01	Portal	Portal			1	2018	Don Emery		3	12/31			No					Engel	0m	12345

Template driven Engagement Software

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

Enabled Security Settings: Allow per session cookies

** These minimum requirements are subject to change. If these requirements change, you will be asked to re-accept the disclosure. Pre-release (e.g. beta) versions of operating systems and browsers are not supported.

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By checking the 'I agree' box, I confirm that:

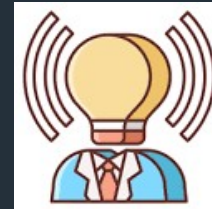
- I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF **(1)** ELECTRONIC CONSUMER DISCLOSURES document; and
- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify Doc.It Inc. as described above, I consent to receive from

Integrated workflow

- **Never miss a deadline!**



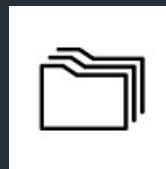
- **Always aware of a project's status**



- **Easier to manage**



- **Multiple workflow templates**



Integration with common tools



- Outlook



- Portal



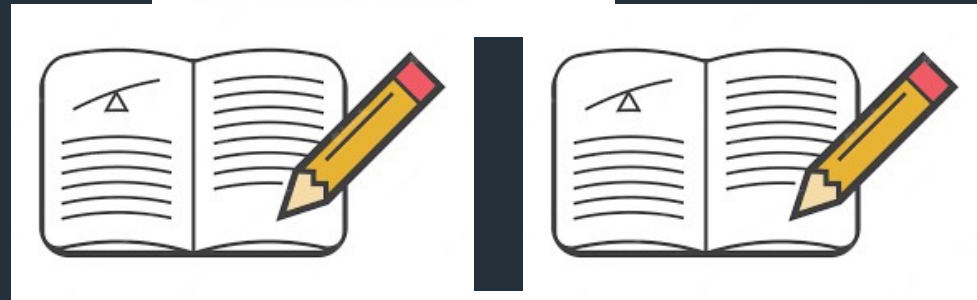
- CaseWare



- 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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