

DT CLIENT PORTAL



Now, it's easier than ever for your firm to serve clients with fast, secure, and convenient online services.

Your clients rely on the web to complete tasks such as paying bills, reviewing financial information, and managing various online accounts, so it's only natural they'd expect online availability to their tax and accounting professional.

DT Client Portal is a private, secure extension of your website providing your clients 24/7 access to your services. At their convenience, clients can retrieve and review personal financial documents and tax returns or use available online communication tools to connect with the firm.

DT Client Portal is part of the innovative DT Max Suite from Dr Tax Software, a Thomson Reuters business. The DT Max Suite is made up of state-of-the-art tools for Canadian income tax professionals who want to serve more clients in less time. The DT Max Suite makes it possible for your firm to achieve unprecedented levels of efficiency through integrated paperless workflow.



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BRIDGE THE PAPER GAP BETWEEN YOU AND YOUR CLIENT

TAKE YOUR PAPERLESS OFFICE TO THE NEXT LEVEL WITH DT CLIENT PORTAL.

DT Client Portal offers you and your clients an ultra-convenient way to securely access documents, finished returns, and other files, transfer data, and convey information. With DT Client Portal, each client is assigned a private, password protected portal. The client portal is a secure extension of your website and your firm and gives your client 24/7 access to your services.



DT Client Portal allows you to reduce printing, postage, and filing costs, and save time with instant document exchange with clients. No more need to try and arrange convenient times to meet with clients or play schedule tag – when tax returns, financial statements, and other documents are ready, just post them to the client's portal for their review. DT Client Portal helps you elevate client service while reducing costs overall.

It's easy for your clients to use DT Client Portal; they simply access your firm's website, click the Client Login link, and enter their personal login and password.

SEAMLESS PRODUCT INTEGRATION INCREASES PRODUCTIVITY (AND PROFITS)

The applications and tools in the DT Max Suite are designed to work seamlessly together as an integrated system. Built-in integration between DT Max and DT FileCabinet, our fully-featured paperless document management system, allows DT Max users to populate DT Client Portal automatically. DT FileCabinet enables firms to establish a paperless office where all client slips, documents, reports, and returns are digitally stored and managed. All content in each client drawer in DT FileCabinet is available to be posted to DT Client Portal.

DT Client Portal integrates seamlessly with DT FileCabinet to streamline your workflow, improve profitability, save time and enhance client service for your firm. When you add the power of DT Client Portal as a component of your current website, you give your clients secure and instant access to the documents they need 24/7 — no email, no paper.

WHY OFFER CLIENT PORTALS TO YOUR CLIENTS?

- **Build profit**

Streamline workflow, minimize expenses and reduce office space — Client Portals are a powerful tool for saving time, reducing printing, postage, storage and shredding costs.

- **Ensure security**

DT Client Portal is one of the easiest and most advanced ways to ensure security for your clients' data, even when you need to supply large files quickly.

Your data stays secure and accessible, and you benefit from minimal up-front investment, no security worries, and automatic backups. And remember, DT Client Portal data is stored securely right here in Canada on Dr Tax servers.

- **Be confident**

Drive traffic to your website as your clients access their personal client portals through it, making it a vital source of information and an invaluable connection to your firm.

- **Save time**

The ability to exchange documents with clients instantly and post finished documents online for 24/7 access offers incredible time savings.

- **Grow your business**

When you offer your clients access to their own client portals, it is easier to supply a wider variety of services and attract new clients—even if they're not in your geographic region.

DT CLIENT PORTAL OFFERS ...

DOCUMENT PRESENTATION

Give Your Clients 24/7 Access to Their Financial Documents

DT Client Portal lets you make your clients' financial documents—completed tax returns, financial statements, reports, copies of source documents, tax slips, and more—available to them in personalized, private portals on your website. Because documents are read-only, your clients can access and use the information at any time without compromising the integrity of the document, and you maintain complete control over what your clients see at all times.

The streamlined integration of DT Max and DT FileCabinet, our powerful electronic document management system, with DT Client Portal makes it possible to serve your clients around the clock with little effort. When documents are complete, you send them directly to DT FileCabinet for permanent storage, then upload the files you want your clients to view to their DT Client Portal portals — seamlessly and securely.

FILE EXCHANGE

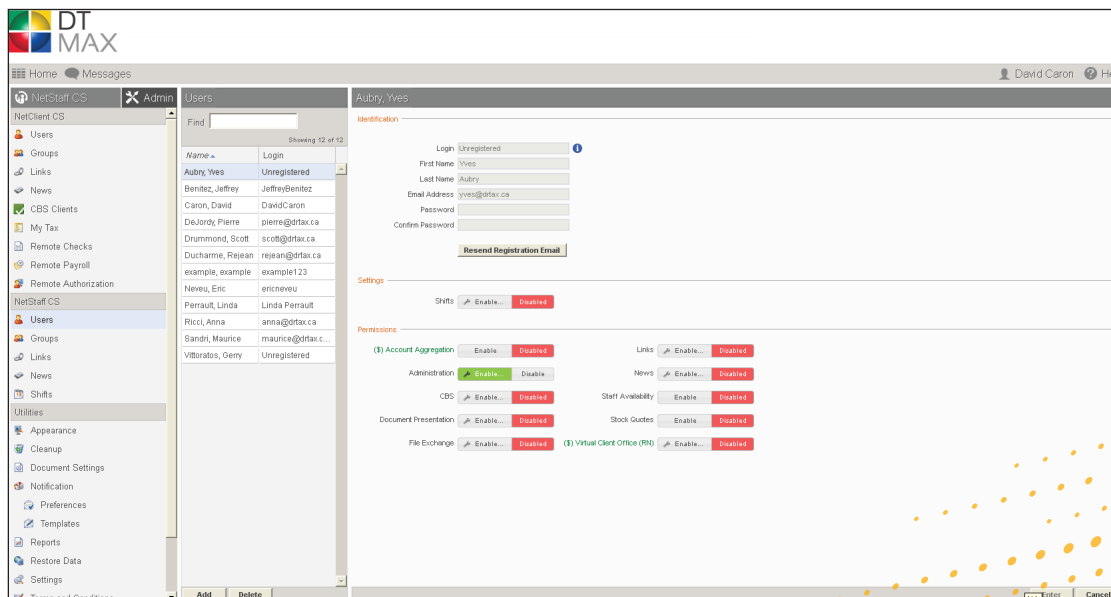
Quickly and Easily Exchange Working Documents with Your Clients

DT Client Portal provides dynamic file sharing through our File Exchange feature—a flexible holding area for exchanging information, data, and other working documents with your clients at any time, from anywhere.

File Exchange makes it easy for you to:

- Exchange information and any type of file up to 2 GB in size (including Microsoft® Office files, budget templates, tax slips and client accounting files) with clients instantly in a private, secure environment that employs 256-bit encryption to protect your data.
- Upload multiple files at once.
- Review and finalize documents in progress.

With Document Presentation and File Exchange, you can also view activity history and use the search feature to find the files you need. It's easy to provide better service to your clients, with less effort—all while reducing costs.





SECURITY AND INTERNET REQUIREMENTS

SECURE, CANADIAN DATA CENTRES - THE ULTIMATE IN SECURITY FOR YOUR DATA

Given the ever-changing security risks that must be considered when transacting business online, we understand your concerns about data security and safety. Because you've chosen Dr Tax, a Thomson Reuters business to serve your accounting needs, you can be assured that your software and data are stored in a secure network of Canadian data centres that are among the most advanced and secure in the world. Every precaution is taken to guarantee the safety of your data. Equipment and facilities are protected against fire, natural disasters, power failures, and other unexpected scenarios.



INTERNET REQUIREMENTS

To achieve optimum performance in the web environment, we recommend a persistent Internet connection with a Service Level Agreement (SLA) and minimum bandwidth of 256 Kbps (e.g., dual channel ISDN, cable modem, ADSL or DSL, T1, or T3). If you have questions about the compatibility of your system, contact your Internet Service Provider (ISP), call us at 1-800-663-7829, option 3, or email support@drtax.ca.

Learn more **by visiting** our Website and join us for a Webinar.



*** Visit us at www.dtclientportal.ca or call us at 1-800-663-7829**

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