



Intuit® Document eSort

An Intuit ProLine Solution

Document eSort is accessed from directly within DMS or Lacerte

Step 1: Go to your desktop and start DMS (or Lacerte):

Step 2: Click on the Document eSort icon in the product toolbar:



Your first five uses of Document eSort are FREE

So give it a try and see what you think. No obligation.

Step 3: Click "Buy Now" to begin your purchase.

The screenshot shows the Document eSort v2.2.0.907 application window. The interface includes a header with the product name, a trial status indicator ('TRIAL - 0 of 1'), and buttons for 'Learn More/Buy...' and 'Give Feedback...'. The main workspace is divided into three steps: '1. Choose Your Client' with a 'Choose Client...' button, '2. Get Your Client's Source Docs' with a 'Get From DMS...' button, and '3. Send Docs to Intuit' with a 'Send Documents' button. A 'Free Trial is Over!' dialog box is centered on the screen, containing the following text: 'You have completed all 5 of your FREE trials for Document eSort. Click Buy Now to purchase this product and continue processing returns immediately. Click Learn More for additional information about the Document eSort product, including pricing, FAQs and workflow recommendations.' The dialog box features three buttons: 'Buy Now' (highlighted with a red circle), 'Learn More', and 'Close'. Below the dialog box, there is an 'Indexing Status Dashboard' showing a client named 'BAILEY, MELISSA N'. At the bottom of the window, there are buttons for 'Save Options...', 'View: All Documents', 'Show all past jobs', 'Close', and 'Help'. The version number 'Version 2.2.0.907' is displayed in the bottom right corner.

Step 4: Enter your payment information.

Document eSort v2.3.0.963

Document eSort
TRIAL - 5 of 5

Send us your client's source docs and we will index and group them for you. You'll get back one organized PDF file that you can open in [Intuit's Document eSort](#).

[Learn More/Buy...](#) [Give Feedback...](#)

Payment Information

By purchasing Document eSort, you are agreeing to a one time set-up fee and recurring monthly billing charges for each transmission. [Click here for specific pricing information](#)



Enter Credit Card Information

Credit Card Type:*
 [What's CCV?](#)

Credit Card Number:*
CCV:*

Card Holder Name:*

Expiration Date:*

[Next >](#) [Cancel](#)

[Save Options...](#) [Close](#) [Help](#)

Version 2.3.0.963

1. Choose Your Client
[Choose Client...](#)

Currently selected client:

Indexing Status Dash

Client Name

- Sanders, Troy L
- Peterson, Quincy
- Woods, Linda
- Williamson, Ryan and Sarah
- Doe, Joe

Send Docs to Intuit

Send Documents

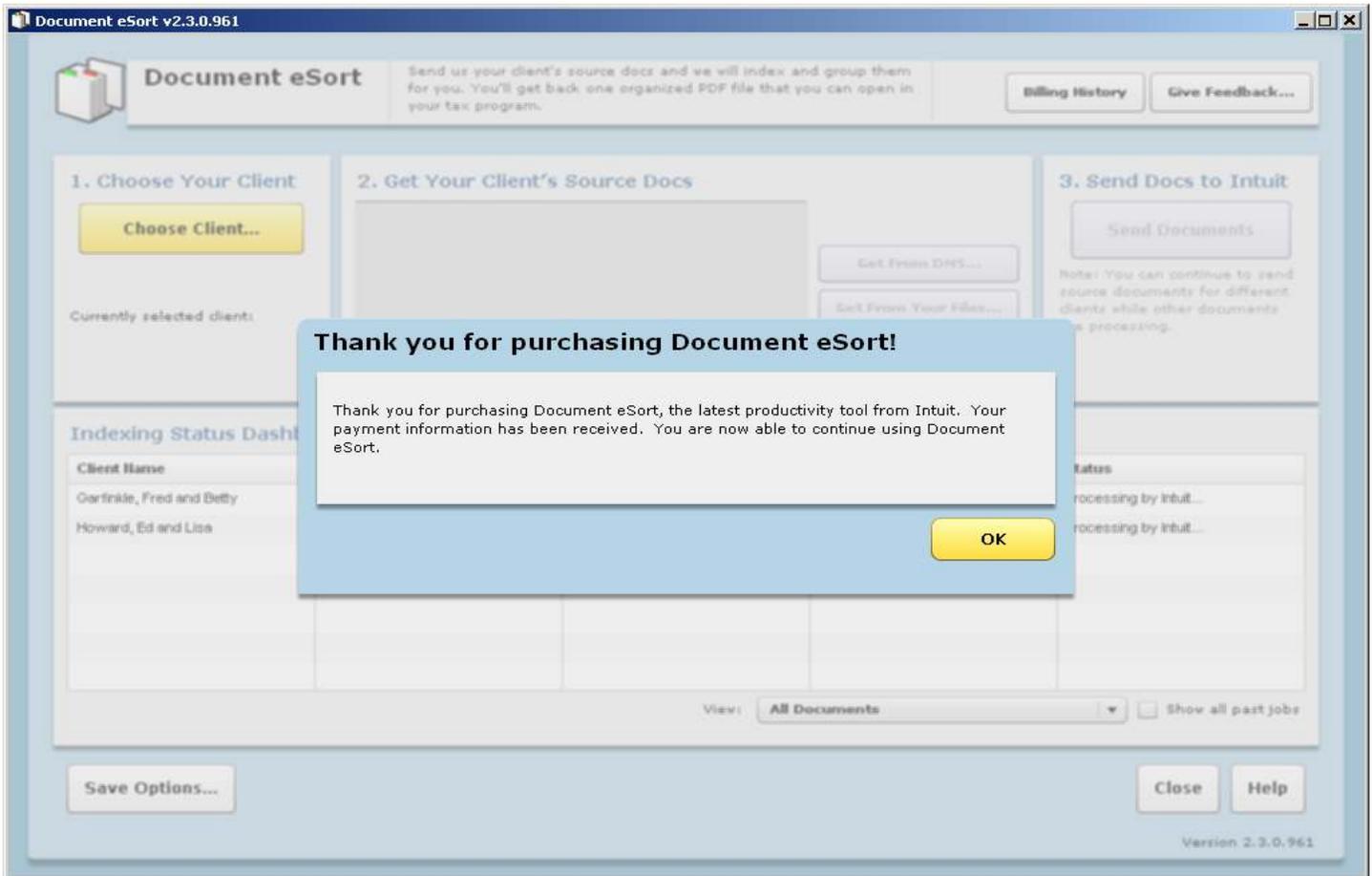
You can continue to send source documents for different clients while other documents are processing.

Status

- complete - Open in Tax

Show all past jobs

Step 5: You will receive a purchase confirmation.



Step 6: View your Billing History by clicking the "Billing History" button.

The screenshot shows the Document eSort v2.3.0.961 application window. The main interface has three steps: 1. Choose Your Client, 2. Get Your Client's Source Docs, and 3. Send Docs to Intuit. A red circle highlights the "Billing History" button in the top right corner. A modal dialog box titled "Document eSort Billing History" is open in the center. It contains the text: "Your billing history is listed below. You will be billed on the 11th day of each month." Below this text is a form to filter the history: "See Billing History for" followed by a date picker, "through" followed by another date picker. A table displays the billing history with columns: Date Submitted, Client Name, Client Number, Billed, and Date Billed. The table contains six rows of data. A "Close" button is located at the bottom right of the dialog box. The background interface also shows an "Indexing Status" section with a list of client names and a "Save Options..." button at the bottom left. The version number "Version 2.3.0.961" is visible in the bottom right corner of the application window.

Date Submitted	Client Name	Client Number	Billed	Date Billed
Fri Jan 9 2009	Carson, Johnny and Bet	2344-FGF	No - Demo	
Fri Jan 9 2009	CLEAVENGER, MARK	2334-CLE	No - Demo	
Fri Jan 9 2009	Decker, Hector and Lily	2356-TYR	No - Demo	
Sun Jan 11 2009	Garfinkle, Fred and Bett	2343-ERT	No - Demo	
Sun Jan 11 2009	Howard, Ed and Lisa	2343-SDF	No - Demo	
Sun Jan 11 2009	Johnson, Burt and Sue	2343-DFB	No	