# 8 REASONS
# ACCOUNTANTS CHOOSE FOXIT ESIGN AS THEIR ELECTRONIC SIGNATURE SOLUTION

**WHITE PAPER**

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# INTRODUCTION

Foxit eSign's full suite of electronic signature tools are designed to simplify and optimize important accounting document tasks – making the paperwork process a better fit for all users involved.

Our signature solution is built to address common paperwork challenges faced in the accounting industry, such as IRS form compliance, with smart resolutions like our knowledge-based authentication (KBA) feature.

By using our comprehensive signing solution, powerful signing control is placed into the hands of accountants and their clients. Not only does Foxit eSign make document completion easier and more streamlined, but our signature solution also allows those in the accounting industry to maximize productivity and efficiency within their daily workflows.

In this document, we'll identify and explore common benefits experienced by accountants while using Foxit eSign which truly establish our electronic signature solution as the optimal choice for this industry.

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# EASIER INDUSTRY COMPLIANCE

Accounting professionals are no stranger to industry compliance rules and regulations. We've made it a priority to ensure our users can more easily and thoroughly meet important compliance requirements at all times.

- **Legally-Binding:** We are fully compliant with all ESIGN and UETA regulations, ensuring your documents are legally-binding.

- **Knowledge-Based Authentication (KBA):** The utilization of security elements like Foxit eSign's KBA and MFA features is not only preferred but often required by the IRS to verify signer identities and maintain compliance with documents such as IRS Form 8879.

- **Detailed Auditing:** Utilize detailed audit trails to document and prove who signed what and where; timestamps, change details, signer IP addresses, signer names, and signer email address are all included.

- **FINRA Compliance:** Foxit eSign supports compliance with FINRA Rule 4512, including FINRA 2019 Regulatory Notice Amendment 19-13 and document retention requirements of Rule 17a-4(f), meaning you can ensure your document sending and signing is always compliant with industry regulations.

# FASTER CLIENT ONBOARDING

When Foxit eSign electronic signatures are implemented, accountants find that client onboarding can be conducted faster and more efficiently than ever before.

- **Easy-to-Use Software Interface:** Foxit eSign's user interface is intuitively designed to limit the need for exhaustive or confusing client onboarding. Our user-friendly layout allows for frustration-free use while maintaining robust and helpful features.

- **Enhanced Convenience:** Our versatile software design amplifies the convenience factor by allowing your clients to sign anywhere, any time, and on practically any device.

# SIMPLIFIED FORM AND TEMPLATE CREATION

Accounting often encompasses the same forms being used repeatedly. With Foxit eSign, we understand that the simplification and streamlining of form completion is essential for accountants and their teams.

- **Easy File Conversion:** Easily upload your essential documents in practically any file format and convert to PDF in a snap, including DOC, DOCX, XLSX, XLS, PPT, PPTX, CSV, TXT, RTF, and PNG.

- **Parallel Workflow-Based Guidance:** Better optimize your tasks with our intuitive and parallel workflow-based interface that fluidly guides you from template creation to sending and storing for a more streamlined and efficient experience for both your business and your clients.

- **Reusable Templates:** Save commonly used forms faster by creating templates in your personal template library for quick and easy sending. Or, send forms and documents conveniently by utilizing our premade template library to customize and send common industry forms.

- **Template Rules Combined with Smart Tags:** Use smart tags to derive name, email, and other information from persons, allowing the bypassing of repetitive manual entry – perfect and easy-to-use for non-techies!

- **Helpful File Replacement:** Switching out or updating documents with the same fields has never been easier than with Foxit eSign! Simply use our template file replacement tool to update templates in seconds.

# ACCURATE AND TIMELY DOCUMENT SIGNING

In accounting, time is of the essence. Not only do businesses and clients expect effective and structured management of their financial needs, but organizations such as the IRS enforce strict deadlines that must be met to avoid penalties and fees. By using Foxit eSign, accountants experience fewer errors and enhanced ability to meet deadlines.

- **Signer Delegation and Flows:** In just a few clicks, you can delegate who signs what and where throughout any document; this saves a lot of time and headache for both signatories and accountants alike.

- **Mandatory Field Completion:** Save time and reduce errors by mandating field completion and providing instructions.

- **Document Instructions:** Guide signatories in a comprehensive manner by adding in custom document instructions.

- **Completion Monitoring and Reminders:** Detailed views give you perspective into where your document signing process is at all times. Plus, you can ensure the timely completion of your document by sending reminders to signers.

# PROCESS AUTOMATION THROUGH INTEGRATION AND API

Foxit eSign makes it easy to implement signing into the app processes you already use. Use Zapier to set up integration workflows in a few clicks with thousands of popular apps like Google Drive and Salesforce, or take it a step further and fully integrate e-signing into your platforms and software with our custom API.

- **Embeddable Forms:** Use pre-generated code to quickly and easily embed signable forms into your website.

- **Zapier:** Automate signing tasks and processes by using pre-built integrations available for 1000s of popular applications.

- **Purpose-Built API:** Incorporate the optimal signing solution for your accounting firm by integrating our software into your platforms using our powerful purpose-built API that offers custom solutions to fit your needs.

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# OPTIMIZED DOCUMENT STORAGE AND MANAGEMENT

Whether it's an IRS audit or a loan application, ensuring documents are always at-the-ready is an important part of all accounting processes. When signing is complete, use Foxit eSign to further optimize document storage and management.

- **Store with Foxit eSign:** Store documents as their completed in your secure Foxit eSign account. Here, you can easily control viewership and access by users as well as rely on our steadfast 24/7 security.

- **Upload to Cloud Storage:** Automate storage and send your documents straight to your favorite cloud storage platform, like Google Docs or Dropbox.

- **Download to Local SFTP Servers:** When you prefer to store locally, you can download completed documents directly to your own SFTP servers for easy access.

# DYNAMIC SECURITY AND VISIBILITY CONTROLS

Bottom line, security is a top priority for accountants due to the privacy and nature of the documents they process. We have designed our signing solution to enforce maximum security at all times, and place intuitive security features into the hands of our users.

- **Control Viewership:** Maintaining visibility control over documents is essential for accounting professionals. Foxit eSign makes visibility control easy with simplified tools for establishing user viewing permissions.

- **Dedicated Security:** With Foxit eSign, stringent SOC 2 Type 2 compliance and AICPA trust principles of privacy, confidentiality, security, processing integrity, and availability are strictly enforced with all documents. Additionally, we ensure optimal security and privacy with our strict network security rules and firewall controls, along with 256-bit encryption.

- **Trusted Data Centers:** We maintain local data residency with trusted SOC 2 Type 2 and PCI compliant U.S. and E.U. data centers.

# COST SAVINGS AND EARNINGS MAXIMIZATION

By switching to digital document signing and completion, accounting firms can substantially reduce their overhead and more adequately use their budgets to meet goals.

- **Get Paid Quicker:** Through the use of electronic signatures, accountants and their firms don't have to wait for paper bills to be mailed, paid, and received. Simply email invoices for approval and payment or embed signing forms on your website for quick filling and payment submission.

- **Save on Paper, Printing, and Mailing:** Digital documents and electronic signing are cheaper than paper and pen-and-ink signing. By switching to digital, accounting firms can substantially reduce their overhead and more adequately use their budgets to meet goals.