

Intelligent Documents & Data

Smart Upload is evolving as part of the broader Intelligent Documents experience. These enhancements make document review faster and more intuitive, helping your team **classify documents, match tracking items, generate tax forms, and complete spreading** with more clarity and less effort.

A CLEANER, MORE INTUITIVE REVIEW EXPERIENCE

We make tracking items, tax forms, and spreading easier to find, understand, and complete — with no disruption to the classification step you already know.

- No change to the classification process you already rely on
- A redesigned review screen that's easier to navigate
- Clearer visibility into tracking item matches
- A simpler way to create tax forms
- Spreading actions that are easier to review
- Less clutter, fewer clicks
- Better organized document cards
- Clear next steps for every uploaded document

WHY IT MATTERS

A faster, easier review experience, without asking your team to learn a new process.

ONE UNIFIED, INTELLIGENT REVIEW EXPERIENCE

We bring classification, tracking, tax forms, and spreading into a single, guided workflow — everything reviewed from one screen

- Classification handled right in the main review screen
- No more separate windows or modals to manage
- Classification, tracking, tax, and spreading, all in one place
- AI recommendations delivered right where you need them
- A more guided, confident review process
- Fewer steps, fewer transitions
- Built for where Intelligent Documents is headed

WHY IT MATTERS

One workspace that brings understanding and action together, so your team moves from upload to done with less friction.

