Find Anything Instantly

All client information—financial statements, tax documents, receipts, invoices, contracts, forms, and correspondence—is stored securely in one searchable location. GrabDocs automatically categorizes every file (receipts, invoices, forms, documents) for instant retrieval.

Managers share clear client updates with partners or teams Staff can ask questions using Chat and instantly get exact information from all records.

Turn Past Work Into Business Intelligence

Analyze financial data across documents to identify patterns. Track spending trends by category, vendor, or time period

Analyze vendor relationship trends. Identify expense anomalies and unusual activity

Automate Document Workflows

Generates spending reports and analytics for client reporting Everything updates automatically as you add new receipts and invoices.

Never Lose Meeting Knowledge

Professional video meetings directly from the platform for client consultations, review meetings, or planning sessions. Automatic generation of clear summaries of key financial points discussed.

Track important deadlines (tax deadlines, filing dates, review dates) Full searchable transcripts for reference

Work From One Connected Workspace

Shared workspaces for teams, practice areas, or client groups Team members can access and work on documents together.

Secure sharing with clients, partners, or stakeholders Initiate video calls and chat conversations directly with workspace members