

® Doc.It's Book of Referrals

PUTTING TRUST IN YOUR PEERS' EXPERIENCE



Doc.It's Book of Referrals

PUTTING TRUST IN YOUR PEERS' EXPERIENCE



Brock Philp,
President & CEO, Doc.It®

I am pleased to provide this resource to allow you to read about how your peers leverage Doc.It Suite. With recent research in the accounting and tax profession indicating some of the greatest challenges in this profession remain workflow and efficiency and increasing concern about the security of data (risk mitigation), I believe your peers' insight in this book will lead you to want to demo Doc.It Suite.

Doc.It Suite is a unique solution; our software provides all the tools you need for document management and workflow and to eliminate paper in your firm; we are value-priced. We earn our clients business by structuring our offering in this way; our customer service is award-winning and our software is repeatedly voted as the accounting software that contributes most greatly to a firm's mitigation of risk.

Doc.It Suite is being adopted by practitioners like you throughout North America for good reason – we stand proudly behind our product and are committed to continuous improvement of the software based on client feedback. Our team is unmatched in professionalism, quality of care, and responsiveness. We care about the success of your practice; these peer-to-peer case studies confirm it.

If recommendations from your peers regarding software for your firm are important, this resource is a great place to start your investigation.

Brock Philp,
President and CEO, Doc.It®

Email: bphilp@doc-it.com Phone: 416-454-8405

TOP 3 REASONS WHY PRACTITIONERS REFER A VENDOR'S PRODUCT

- 1. They trust this vendor.**
- 2. Great client service from this vendor.**
- 3. They know others would benefit from working with this vendor.**

Source: 3rd Annual Accounting Firm Operations and Technology Survey



TABLE OF CONTENTS

Letter From the President. 2

Cassell & Hendricks, CPA, PA. 4

Brown LLP 6

Donald M. Grefe, CPA 8

Lorenz & Currie CA 10

Buller, Wuite, Olsson & Rosenberg, PC 12

Lapp, Fatch, Myers and Gallagher. 14

Feldstein & Associates LLP 16

Rozovics Group, LLP 18

CPA Group of Laramie. 20

Lutz and Carr CPAs LLP 22

Join A Webinar. 23

Watch These Videos 24

FAQs About Doc.It® Suite 25

Experience Doc.It® Suite 26

Contact Us 27



Cassell & Hendricks, CPA, PA

**“WE ARE 100% PLEASED WITH DOC.IT SUITE
AND WOULD DO IT AGAIN!”**

– Branden Daniels, CPA, Partner

OUR IT SOLUTION

I handle IT and we use an IT contractor when needed. When we adopted Doc.It we were ready for the transition; our IT contractor helped for a few hours during the installation of Doc.It.

THE ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT

We needed to resolve a few issues we didn't want to deal with anymore. Every year our staff would spend three to four weeks working on shuffling paper around to make room for the next year of paper. Additionally, we were tired of the hassle we went through to access documents.

THE PROCESS I FOLLOW WHEN MAKING ACCOUNTING TECHNOLOGY PURCHASING DECISIONS

It can take one year from the point in time when our partners decide we need to take action to complete our investigation and purchase the technology. It is also common for us to wait a year to investigate a technology and spend three months investigating alternatives.

The process I usually follow:

- I search accounting publications.
- I read articles and case studies to figure out what my peers are doing.
- I visit the websites of the accounting technology products I want to investigate.
- I schedule a product demo and talk to the sales representative.
- I present my recommendation to the partners; they usually go through a demo of the software to experience it, then accept my recommendation.

Location:
South Carolina

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
UltraTax
Accounting CS
QuickBooks

5

Doc.It® licenses



WHAT I LIKE ABOUT DOC.IT SUITE

- The flexibility of the software, Doc.It Suite works with multiple programs. For example, we use a variety of programs that generate work papers; they all go into Doc.It.
- Files are stored in an easily accessible PDF file format; there is no reliance on Doc.It Suite or any software program.
- The simplicity of using the program; it is intuitive.
- We are not forced into modules we do not want, we can use any module or all. For example, our first priority was to master the paperless initiative, we then had the flexibility to roll out additional modules like Doc.It Workflow, whenever we want to.
- Doc.It's PDF Editor. I love the calculator and mark-up tools. We already have Adobe, but if you're working in a paperless environment you need easy access to mark-up tools that are similar to what you're using.
- We like the flexibility of adding licenses whenever we need them. For example, we add licenses at the beginning of the year for our seasonal staff, then cut back when those people are not with us.
- Doc.It's pricing was a decision-making factor, we like their pricing.

WHAT HAS IMPROVED IN OUR FIRM SINCE THE ADOPTION OF DOC.IT SUITE

- We started with Doc.It in 2015 and have not generated any new paper client work papers.
- We have not transferred any files into storage this year.
- Office products costs have decreased substantially.
- We have decreased storage cost.
- In two years we will not need paper file cabinets.
- We have experienced time-savings from not having to shuffle paper and when accessing documents. For example, when a client calls their documents are at your fingertips; documents are in front of you at that very moment, anytime a client calls.
- Billings have increased since the adoption of Doc.It Suite, but that is difficult to tie directly to Doc.It.

MY ADVICE FOR MY PEERS IN THE PROFESSION WHO ARE CONSIDERING DOC.IT SUITE

We are 100% pleased with Doc.It Suite and would do it again! The adoption of Doc.It Suite would have been easier if we would have talked to a firm like ours. We would have benefited from seeing the set-up of their folders and templates.

The top reasons we recommend Doc.It:

- It is usable with all your programs.
- Doc.It tech support is superb. For example, if I email them a question, or call in for support my question is answered and the issue is resolved within minutes.
- We have never had any downtime with Doc.It. If we have questions or if there is an issue, it is quick and easy to work with their tech support team and get problems resolved immediately.

Brown LLP

“I STRONGLY RECOMMEND DOC.IT TO EVERY FIRM”

– Sherry Galesloot, Senior Accounting Technician

OUR IT SOLUTION

I handle our daily IT management needs and outsource IT when needed. We did not need much help from our outsourced IT when we installed Doc.It. Because we added a new server at the same time we installed Doc.It, what might have only taken a few hours to set-up and migrate files required a weekend.

ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT

- We were looking to increase your firm’s productivity.
- We wanted to gain office space by getting rid of the file room.
- We wanted all client information accessible from every computer.

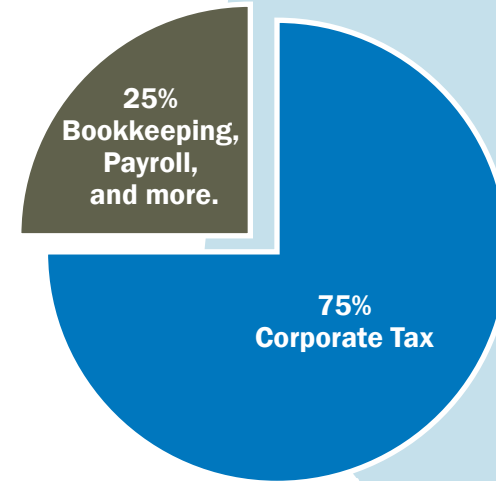
THE PROCESS I FOLLOW THAT RESULTED IN OUR DECISION TO BUY DOC.IT

I handle the task of gathering information on software; I am interested in compatibility and integration, price, features and function. It is common for me to begin my search immediately following tax season. I may make a decision in one- to three-months, this timeline hinges on the partners availability.

With Doc.It, we had talked about going paperless for three years before we started our investigation. In hindsight we put it off way too long; I would never wait that long again. Once we made the decision to go with Doc.It, it happened quickly. It can happen in a matter of a few weeks.

The process I usually follow:

- Search Google.
- Call my peers.
- Visit the accounting technology vendor’s website.
- Demo the software.
- Present the solution to the partners.



Location:
Alberta, Canada

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
TaxPrep
QuickBooks
Sage 50

8

Doc.It® licenses

WHAT I LIKE ABOUT DOC.IT SUITE

We learned a lot about Doc.It by using it in the firm we worked in prior to starting our firm. When you buy into Doc.It you have to keep an open mind and be prepared to make changes. You cannot do things like you did when you operated with paper or another document management software.

Additional aspects I like about Doc.It:

- I like that Doc.It continues to improve their product.
- Their software is easy to use.
- I like how well it integrates with CaseWare and all our software.
- I love the Doc.It Archive; everything you need is at your fingertips and you have the ability to search quickly.
- The Doc.It PDF Editor is better than Adobe; the tools are better and it is more customizable than Adobe. I love the Text feature, Calculator, Highlighting Tools; everything is better and it is more user-friendly than Adobe.

WHAT HAS IMPROVED IN OUR FIRM SINCE THE ADOPTION OF DOC.IT SUITE

- The biggest improvement is increased productivity with our file prep; we have seen 35% improvement in prep time. Over time we get better with the software and expect prep time to continue to improve.
- The Doc.It Archive is so much more secure than paper.
- We now have no paper files or a file room. When we moved to a new office we realized we would never need a file room, ever.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

I strongly recommend Doc.It to every firm. If you are hoping to improve your system, going from scanner, to PDF Editor to Doc.It Archive is great. I recommend talking to a firm your size that is using Doc.It and find out about their experience. I did this, it was helpful.

THE TOP REASONS WE RECOMMEND DOC.IT SUITE

- Customer service is very good.
- It is easy to use.
- Doc.It continues to improve the product.

Donald M. Grefe, CPA

“DOC.IT SUITE WORKS! IT WILL DO SO MUCH FOR YOUR FIRM AND HANDLE WORKFLOW AS WELL.”

– Don Grefe, CPA, Owner

OUR IT SOLUTION

We manage IT in-house and engage an IT consultant for about 1-hour per month. Our IT consultant manages our domain and provides off-site back-up.

When we adopted Doc.It Suite we used our IT consultant for about two hours for the initial installation and I spent several hours getting my firm ready for the paperless transition. I expected to spend this time to ensure we had what we needed in place to handle the transition to paperless and for back-ups.

ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT SUITE

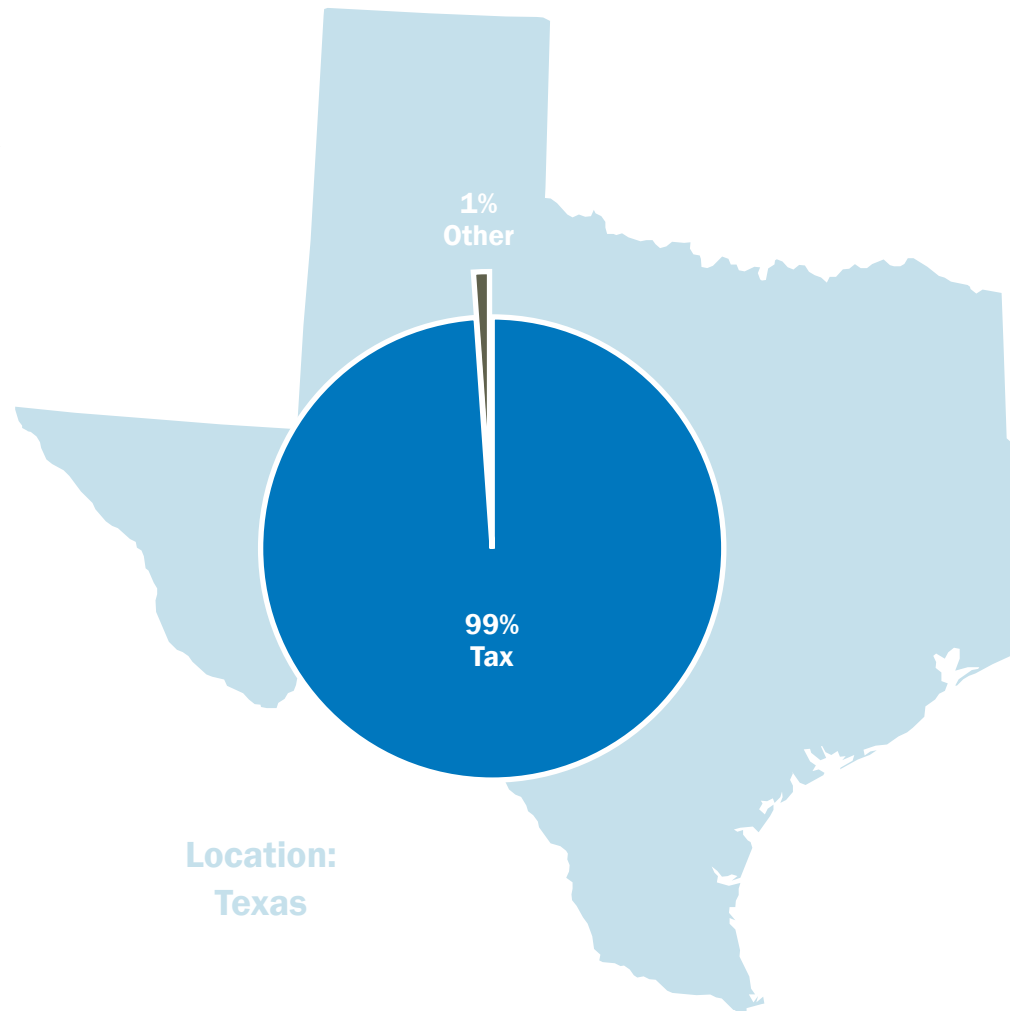
I wanted to become more efficient and paperless. I came to the realization that keeping paper around and storing more paper moving forward was not the way of the future. I wanted to be able to work from a remote location without lugging paper files around.

I was a Lacerte Tax software user and initially considered their document management software (DMS). However, after monitoring the chat group of their DMS users I decided I did not want to use that technology. Instead, I wanted an independent provider like Doc.It that would allow me to get my data out if I wanted to. Doc.It was the solution.

THE PROCESS I FOLLOW THAT RESULTED IN THE DECISION TO PURCHASE DOC.IT SUITE

I am the only one in my firm involved in accounting technology purchasing decision-making. Deciding on purchasing technology can take years, buying Doc.It Suite was no exception.

I became interested in going paperless back in 2009 and purchased Lacerte DMS when it was first available, but I never installed it. Instead, I started monitoring the user group chat room about the product. Today, as I reflect back



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
UltraTax CS

9

Doc.It® licenses



DONALD M. GREFE, CPA CONTINUED

on this timeline, I wish I had installed a solution earlier but I am thankful I waited; I am absolutely convinced I have a better product with Doc.It Suite.

The process I usually follow:

1. One of the first places I go and rely on for information about accounting technology are my colleagues; peers in the profession.
2. I search accounting websites and search for articles and product reviews.
3. I monitor what my peers are saying in user group chat rooms to learn about their experience.
4. I attend events that provide CPE.
5. I demo the software I am interested in.

WHAT I LIKE ABOUT DOC.IT SUITE

- Doc.It Suite has the files stored in a format I can get my files out if I choose to leave Doc.It Suite. I liked not being “stuck” and having the freedom to leave if Doc.It Suite didn’t work for our firm.
- Doc.It Suite’s built-in PDF Editor is a real plus.

WHAT HAS IMPROVED IN OUR FIRM SINCE THE ADOPTION OF DOC.IT SUITE

I am not hauling files home at night and we have noticeably less paper. For example, I relocated my office a few months ago and nearly every piece of prior year paper we moved was from 2011 and earlier. That paper was sent off to storage and our file shelves today are pretty much empty. I literally have not stored paper files since we started with Doc.It Suite in 2013. Before 2012 returns, we would have had to pull a year of files out of the storage area to make room for the next year’s tax files. I haven’t scanned really old files and probably won’t. If I need to get old paper files, I call my storage facility and they bring it for me the same day for a fee, or the next day at no charge.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

Doc.It Suite works! It will do so much for your firm and handle workflow as well. Doc.It Suite will allow you to handle work papers as you prefer to handle them. It solves the work paper technique issue.



Lorenz & Currie CA

**“IF YOU ARE LOOKING FOR GREATER EFFICIENCY
I RECOMMEND DOC.IT SUITE.”**

– Richer, Partner

OUR IT SOLUTION

We have a 3rd party IT service provider. They were amazing with their help implementing Doc.It; they sat in on all of our rollout meetings and did not charge us for their time.

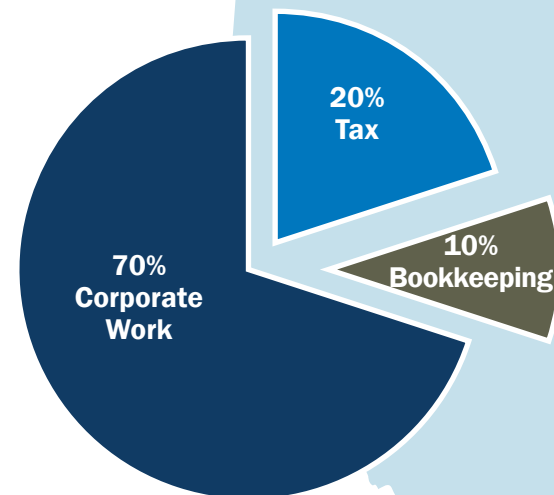
THE PROCESS WE FOLLOW THAT RESULTED IN THE DECISION TO BUY DOC.IT SUITE

Efficiency gains trigger our decision to take action. We are motivated to take action by what we learn at the annual Entrepreneurial CPAs of Edmonton event. We begin our investigation which typically involves a call with the accounting technology sales person. Our 3rd party IT service provider makes recommendations too, however, we consider their recommendations keeping in mind they provide services to all types of clients, not just accounting firms.

Our timeline to purchase varies; eight months is common. Because our annual Edmonton event occurs in November our timeline to adopt can take up to eight months; we take time to think about a product. This timeline also factors in the likelihood of having to put the adoption of a technology on hold due to busy season. It is common to go forward with a new accounting technology by the end of May or during June.

We found Doc.It Suite because Dwayne Bragonier spoke at our conference and recommended it. This initiated our investigation. We also needed a server upgrade to be eFile compliant, we handled this implementation at the same time.

Attending events can help in our purchasing decision-making as well. We like hearing our peers comment in a session, but really enjoy the informal after-hours social mixers where attendees seems open and willing to share. We like talking to like-sized firms about what they are using in their firm and how it is working for them.



Location:
Alberta, Canada

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
TaxPrep
Sage
QuickBooks

12

Doc.It® licenses



WHAT I LIKE ABOUT DOC.IT SUITE

We really like the Doc.It Archive explorer. We have every file and document at our fingertips.

WHAT HAS IMPROVED IN OUR FIRM SINCE THE ADOPTION OF DOC.IT SUITE

We have had Doc.It Suite for two years. We are starting to see a significant decrease in our paper files. We are comfortable enough with the technology to archive old files resulting in a paper shrink and added efficiencies. For example, file retrieval has changed. Today, when a client calls I can access their information immediately on my computer versus how I used to have to handle this scenario; calling them back because I had to go find the information.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

If you are looking for greater efficiency I recommend Doc.It Suite. In the long-run, the use of Doc.It will result in greater efficiency and huge space-savings for your firm. Saving space will lower expenses because it costs far more to rent physical space than it does to use server space.



Buller, Wuite, Olsson & Rosenberg, PC

“DOC.IT HAS IMPROVED OUR TAX PREP PROCESS AND INCREASED EFFICIENCY.”

– Bobbie Rosenberg, CPA

OUR IT SOLUTION

We have a hosting company and IT company providing managed services. We recently changed providers to have a more cohesive management group. We run on a Remote Desktop set-up and our applications are hosted both on physical servers as well as in the cloud. Each staff person has multiple monitors at their workstation as well as a desktop scanner. We are a less-paper office and with the implementation of Doc.It, have moved to pre-scanning many of our tax returns.

THE ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT

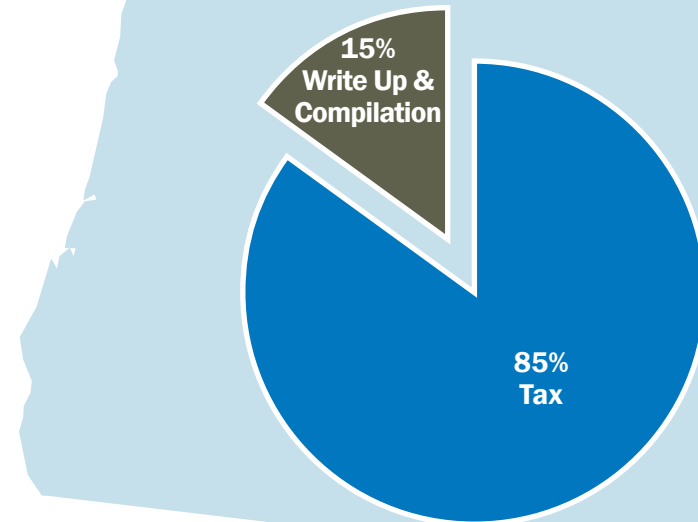
We were using Windows for filing and it was taking too long; there were too many steps required to get tax documents into folders.

Overall we were looking to improve efficiency. Document management with integrated workflow was the most important factor. It was also important to have a web portal integrated in the document management software. We also wanted to be able to lock down folders when work was done.

THE PROCESS I FOLLOW WHEN MAKING ACCOUNTING TECHNOLOGY PURCHASING DECISIONS

I attended the AICPA Prac Tech+ Symposium with my business partner Jodie Olsson. One reason for attending this conference was because we had identified a need to replace our workflow software, at the same time we had an interest in exploring new products to increase our overall efficiency. We were leaning towards tax automation software prior to attending the conference and had already done several demonstrations with different products.

While attending the AICPA Prac Tech+ Symposium we met someone from Doc.It which led us to the Doc.It booth and their product demonstration; this changed our direction. The ability to use Doc.It to address our workflow issues with a document management system seemed to be a better alternative for us.



Location:
Oregon

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
Lacerte
QuickBooks

14

Doc.It® licenses

After the conference, I talked with several fellow practitioners about what they were using and how things were working for them. From there we made the decision that Doc.It was the better option for increasing the efficiency of the tax prep process. We bought the software soon after the demo.

The process I usually follow:

- Identify a need.
- Review options, discuss with peers, attend conference and view products.
- Research and vet products.
- Talk with vendors and demo products.
- Review and confirm product will improve our procedures.
- Purchase a product.

WHAT I LIKE ABOUT DOC.IT SUITE

- Doc.It has improved our tax prep process and increased efficiency.
- The workflow tools and process are easy to use.
- Doc.It bookmarks pages for us.
- The folder structure within the work binders makes it easier to do review.
- Doc.It's scanning and OCR capabilities.

WHAT HAS IMPROVED SINCE THE ADOPTION OF DOC.IT SUITE

Our efficiency has improved; we are a lot more efficient moving jobs through the office. Doc.It has given us the ability to pre-scan, a task handled by admin staff which frees-up our accounting personnel. Pre-scanning results in a quicker close to the tax season, a quicker close to everything.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

The way your file structure is today will impact your implementation of Doc.It. I encourage you to pay attention to the workflow aspect.

We have learned a lot from using Doc.It the first year. I advise you to pay very close attention to training and do things at a micro-level when setting up the system, it will save you time later. In hindsight, I wish we would have been more detailed upfront. Don't take set-up lightly, pay attention to this.

THE TOP REASONS WE RECOMMEND DOC.IT SUITE

- Ease of use.
- Improved efficiency.
- Tech support and Doc.It personnel are great.

Lapp, Fatch, Myers and Gallagher

“DOC.IT IS AFFORDABLE; IT HAS IMPROVED CLIENT SERVICE TIME, IT IS EASIER TO FIND DOCUMENTS AND THEIR TECHNICAL SUPPORT STAFF IS EXCELLENT.”

– Pat Malvarose, Firm Administrator

OUR IT SOLUTION

I handle IT and we use a networking management firm and pay for network resources. The network management firm updates servers and makes recommendations. I was responsible for the onboarding of Doc.It Suite.

THE ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT SUITE

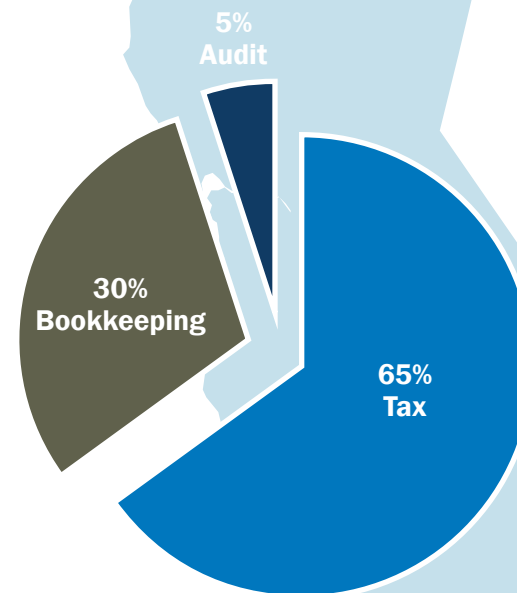
Intuit DMS was no longer going to be available; they recommended a cloud-based application as an alternative. We are in an agricultural community and would need better and more consistent bandwidth for this to be considered. Infrastructure is something I am focused on; our firm's infrastructure was not ready for what Intuit was recommending.

THE PROCESS I FOLLOW THAT RESULTED IN THE DECISION TO BUY DOC.IT SUITE

I found Doc.It Suite by doing a Google search. This led to an article on TheProgressiveAccountant and I listened to Randy Johnston's recommendation.

Attending events can help the process of making a decision to buy accounting technology. I especially like events where members of the audience speak-up about products. It is pretty convincing to hear from your peers about their experience with a product. It is usually the owners who speak up in this setting; it is an interesting perspective to listen to. After attending these events I feel like I better understand what the next five years might hold in terms of where technology is headed.

Location:
California



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
CCH ProSystem fx
QuickBooks Enterprise
CCH Trial Balance

17

Doc.It® licenses



The process I usually follow:

- I search Google. This will lead to articles (e.g. TheProgressiveAccountant) and blog posts (Randy Johnston's K2 Enterprise Blog). This also often leads to newsletters.
- I use the CPAFMA Forum, where I post questions and listen to my peers' feedback.
- My investigation focuses on these areas:
 - Network and hardware requirements.
 - User-friendliness. If a product is intuitive the learning-curve will be better.
 - Whether the product integrates with other software.
- I meet with the technology partner and present options.
- We might engage in a web demo or meet with a sales representative if one is in the local area. During these demos and meetings the technology partner has their questions answered.
- The technology partner presents the findings at a weekly technology meeting.
- The partners get back to me when they are ready to make a decision.

Making an accounting technology purchase decision after tax season and can take 6-months. I spend four- to six-weeks investigating the providers of an accounting technology. After my investigation is complete I have to work around other people's vacation schedules to move the process forward.

WHAT I LIKE ABOUT DOC.IT SUITE

- Affordable
- User-friendly
- Small resource requirements
- Historical versioning
- Excellent technical support staff
- Don's webinars

WHAT HAS IMPROVED IN OUR FIRM SINCE THE ADOPTION OF DOC.IT SUITE

- Client service time
- Easier to find documents
- Staff confidence that data is backed-up
- Standardization of folder hierarchy

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

You need to evaluate your present document retention policies, the adoption of Doc.It initiates and aids that process.

When your firm adopts Doc.It Suite, I have several recommendations for my peers:

- Understand how processes and handling documents and files will change.
- Be prepared to set up and respect retention policies.
- Be prepared to increase storage on your server or upgrade your server.
- Take the time to develop your binder templates for each type of project. Do it and get it over with. Do not put this off and think you will do it at a later date; that would be awful.

Feldstein & Associates LLP

**“WE KNOW OUR DOCUMENTS ARE SECURE;
THEY WILL NOT BE ACCIDENTALLY DELETED.”**

– Judy Burgess, Accounting Tech and Office Administrator

OUR IT SOLUTION

I am our in-house IT manager, we also have an outside IT pro we call upon when needed.

THE ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT

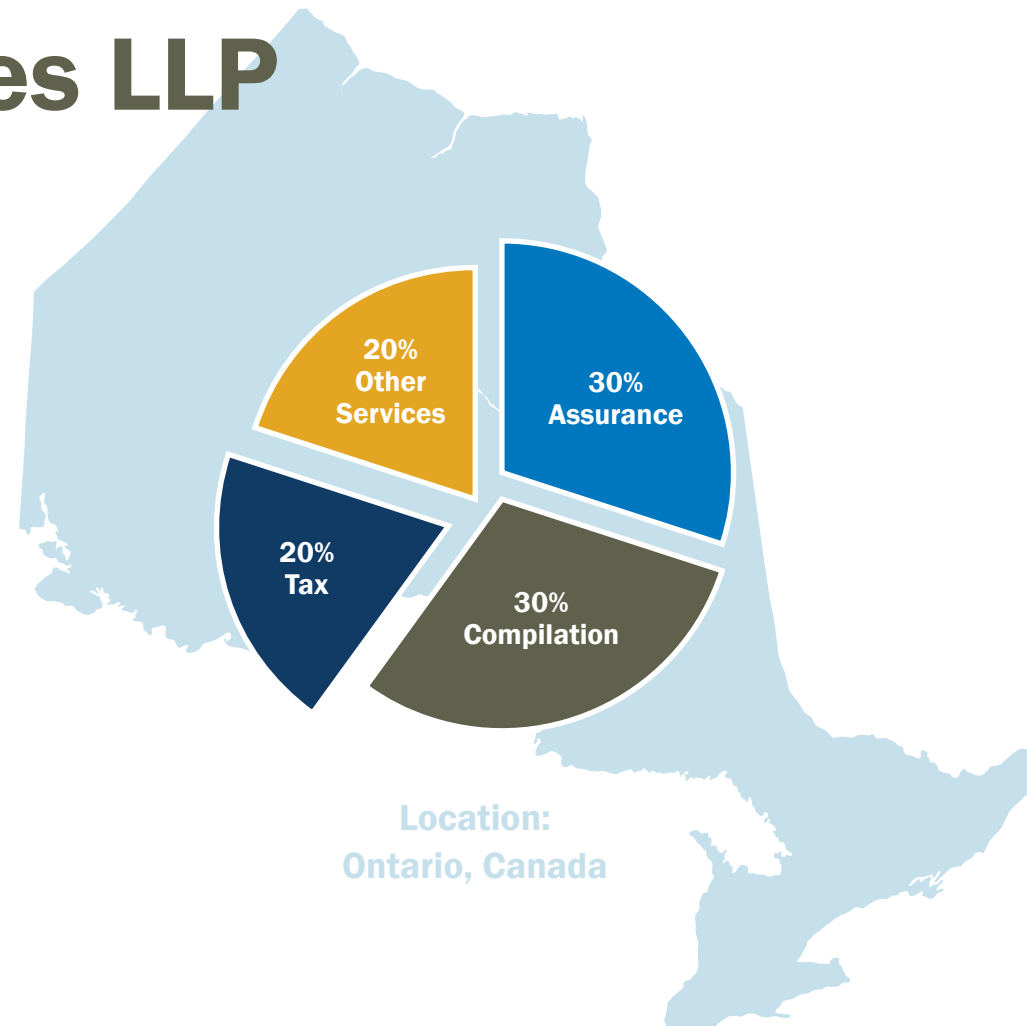
We bought Doc.It after we decided we wanted to go paperless and needed a more secure method for storing documents. Before Doc.It, we were keeping digital files on network where there was risk of someone inadvertently deleting files.

THE PROCESS I FOLLOW THAT RESULTED IN THE DECISION TO BUY DOC.IT SUITE

Our process and timeline for buying new software depends upon how big the change will be. A 6-9-month timeline is common. During the investigation and demos, we bring other people into the discussion to listen to their opinions. The investigation, product demos are handled by the managing partner and me; the final decision to purchase is made by the managing partner.

The process we usually follow:

- Google search.
- Talk to other firms, the peers we know.
- Contact vendors to schedule demos of the software.
- Discuss pros and cons of the software which results in us picking the software. We discuss how much time will be required to make the addition or change, and what changes the firm will need to make.



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
Thomson Reuters DT Max
CaseWare
CanTax FormMaster

18

Doc.It® licenses

WHAT I LIKE ABOUT DOC.IT SUITE

- We know our documents are secure; they will not be accidentally deleted.
- We like the CaseWare batch print feature, which is required to lock-down assurance engagements.
- We like the AFR process for T1 files.

WHAT HAS IMPROVED SINCE THE ADOPTION OF DOC.IT SUITE

- Our T1 process has improved; the sorting is done before accountants get the T1 files, it is organized for them when they get it.
- We don't have to track down a paper file.
- We are just starting the process of transferring our T1 files and corporate archive files into Doc.It. We are looking forward to this; it will be an improvement and make it easier to send files.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

- Sit in on a webinar.
- Ask a lot of questions.
- Talk to other firms who use Doc.It.

THE TOP REASONS WE RECOMMEND DOC.IT

- Friendly fast efficient customer service.
- Easy to use.
- Security.
- Web portal as a more secure way to send/receive documents and to transfer larger files.



Rozovics Group, LLP

“WE STARTED WITH DOC.IT FOR STANDARDIZATION AND ARCHIVING TO HELP US ENSURE A SMOOTH TRANSITION OF CLIENTS WHEN PARTNERS RETIRED. A BONUS FOR OUR FIRM HAPPENED WHEN WE IMPLEMENTED DOC.IT WORKFLOW LAST YEAR; WE USED WORKFLOW THROUGH THE TAX SEASON.”

– Jeff Rozovics, Managing Partner

OUR IT SOLUTION

We have an in-house IT manager, who also runs an IT business out of our location. The installation of Doc.It was a team effort. We spent time with a Doc.It team member to prepare our legacy files for migration into Doc.It. Our IT manager was involved in the one-day migration of our legacy files from FileCabinet into Doc.It.

Comments from our in-house IT manager:

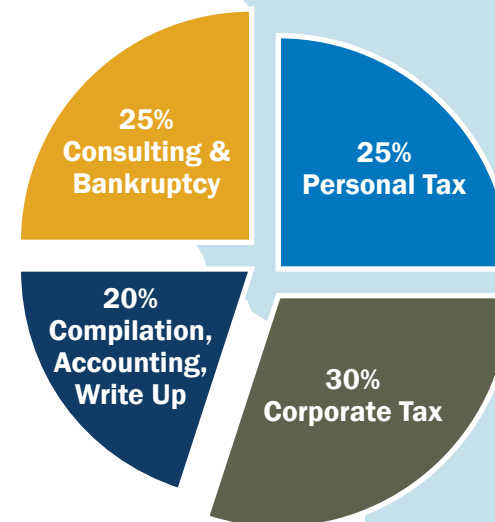
The initial installation and coordination was not time-consuming, perhaps 4- to 5-hours for the install and two hours of coordination. The migration from FileCabinet to Doc.It was a piece of cake for me, Doc.It did all the work; I just got them into our server.

I had to read and understand the IT requirements, which took another 2- to 3-hours. Post installation is where you might run into training glitches or software glitches. When this happens, you relay the issue to Doc.It support and it gets fixed. Having a Doc.It project champion team member helped us work through the glitches as we got up to speed.

THE PROCESS I FOLLOW THAT RESULTED IN THE DECISION TO BUY DOC.IT SUITE

My father founded our firm 40 years ago; we anticipated he and other partners would be retiring. This impacted our decision to investigate ways to improve our firm to make the transition of clients easier.

We were using FileCabinet; its storage started getting larger every year, there were a lot of documents in it. The issue we were having centered on FileCabinet allowing different methodologies and file structures to be used by different partners. We knew it would be difficult for the next partner to take over a client when a partner retired.



Location:
Illinois

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
UltraTax

19

Doc.It® licenses



ROZOVICS GROUP, LLP CONTINUED

We knew we did not want to continue with FileCabinet; Doc.It came highly recommended. We did not investigate any other providers because of the recommendations for Doc.It. I was one of the three people investigating Doc.It. Our IT manager was involved in the investigation, installation and the training of Doc.It.

My first experience with Doc.It Suite was a demo of their software at the Illinois Society of CPAs show.

The process I usually follow:

- My peers recommend a software; this typically occurs while we are at an annual event.
- I demo the software.
- I have talked to Randy Johnston several times, he is a speaker at our annual CPAConnect conference. Also, I might read marketing material featuring Randy Johnston, I am interested in what he has to say.

WHAT I LIKE ABOUT DOC.IT SUITE

With FileCabinet we had 15-year old files that should have been purged that were still being stored; we wanted a better filing system and records retention system.

We knew Doc.It would provide firm-wide standardization resulting in documents being found quicker; the transition of clients from one partner or accountant to the next would be smooth. Doc.It ensures standardized naming conventions and retention policies are applied when documents enter the system, this allows us to purge documents at the end of their retention period.

We started with Doc.It for standardization, archiving and to help us ensure a smooth transition of clients when partners retired. A bonus for our firm happened when we implemented Doc.It Workflow last year, we used Workflow through the tax season. We defined workflow steps in the tax process which resulted in us knowing exactly where every return was in the process; we are a lot more efficient because of this. Doc.It went from being our document management software to our document management and workflow software; we are sold on it.

The implementation of Doc.It took time, it was well thought-out. Setting it up to work in the standardized way we want our firm to work was worth the time invested.

WHAT HAS IMPROVED IN OUR FIRM SINCE THE ADOPTION OF DOC.IT SUITE

- We have had major efficiency improvements throughout our firm.
- We have far better organization of our documents. For example, during the year we talk to clients who are closing on a house or commercial building. They send us documents that may not be needed until the following year. With Doc.It the documents are handled in a standardized way; anyone working on a client file would be able to find documents whenever they are needed. Without Doc.It it would have been hard to find those documents when we need them.
- Files are never lost or difficult to find.
- Our accountants or partners get immediately into a client file and know exactly where to find information, even if they are not familiar with the client.
- Because of Doc.It Workflow, during tax season we know exactly where every tax return is at in our 10-stage process. This is a big improvement from where we were at before implementing Doc.It Workflow.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

I highly recommend Doc.It. We were always paperless but used FileCabinet which lacked the structure and standardization we wanted - and gained - with Doc.It.

Think about your firm's tax return process. Our tax return process used to require manual checklists and routing sheets. Today this is handled through Doc.It Workflow in a 10-step process we defined. We know the status of every tax return at any time.

When considering the adoption of Doc.It, look at the big picture. It is mission-critical to have it. Everyone should know how to use it because the standardization it provides will ensure great efficiency gains. As we look to the future there is peace of mind knowing the more people we add in our firm the more beneficial standardization becomes.



CPA Group of Laramie

“OUR FIRM’S DOCUMENT MANAGEMENT AND STORAGE HAS IMPROVED 100 PERCENT SINCE IMPLEMENTING DOC.IT.”

– Terrie Anderson, Office Manager

OUR IT SOLUTION

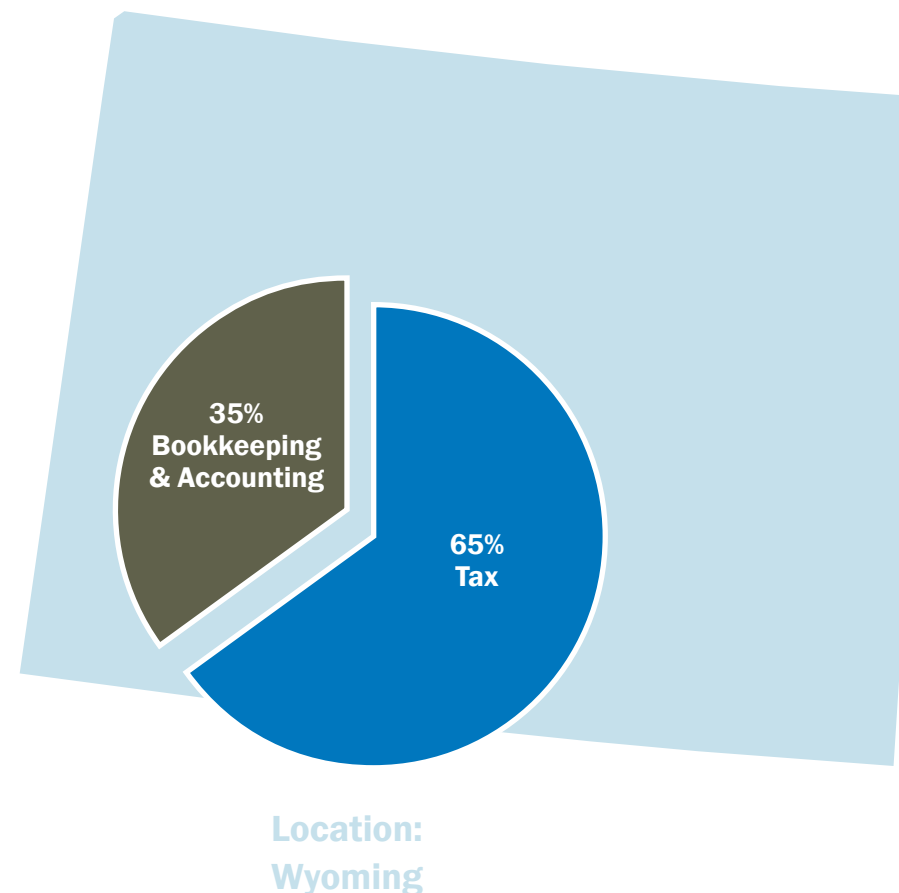
We handle what we can in-house and outsource the rest to an IT firm. When we decided to go with Doc.It, our IT firm worked closely with Doc.It Support personnel to get our servers ready and assisted with the entire process of installation and testing

THE ISSUES THAT FUELED OUR DECISION TO INVESTIGATE DOC.IT

We were using Thomson Reuters’ FileCabinet module which is connected to UltraTax and Practice CS (for Time & Billing). While FileCabinet initially worked pretty well, it started to constantly freeze and crash! We struggled with the ever-growing instability of FileCabinet for about three years before an IT person from UltraTax finally told us that FileCabinet was not meant for a firm of our size. They recommended a cloud version of their UltraTax and FileCabinet but the fee for the cloud version was expensive, and we were not ready to move to the cloud.

We made the decision to emulate File Cabinet’s structure of clients and subfolders-by-year on one of the drives on our server. As a tax return was done, we did a copy/transfer process of PDF documents into the client’s folder. We thought it was working out pretty good until one day about half of our client folders were gone! Someone mistakenly moved the folders from one year to the next. While this was an accident, it was extremely unsettling. That mistake made us all aware of just how fragile and unsecure our self-designed emulation of File Cabinet was and how easily it could all have been deleted.

An ever increasing workload demanded that we take a serious look at a more cost effective and efficient way to do business. Everyone in our firm really likes Doc.It, even those who were initially skeptical at the economic viability of and learning how to use the software. In fact, not one of us would ever consider going back to how we used to do things.



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
UltraTax
QuickBooks

20

Doc.It® licenses



THE PROCESS WE FOLLOW WHEN MAKING ACCOUNTING TECHNOLOGY PURCHASING DECISIONS

It takes approximately six months to make a major purchasing decision. We have four partners and 10 accounting and administrative support staff. We try to give everyone who will use the product an opportunity for input before we decide to buy.

The decision process we follow:

- Research the products.
- Demo products.
- Summarize product options and meet with the appropriate managers and staff.
- Identify all aspects of workflow impact. Obtain manager and staff input and remain open-minded.
- Meet with partners and present product options.
- Partners make the final decision.

WHAT I LIKE ABOUT DOC.IT SUITE

- AutoFiling, WorkFlow, Document Retrieval, Report Features
- Templates and setups that can be customized to work for our firm.
- Awesome tech support

WHAT HAS IMPROVED IN OUR FIRM SINCE THE ADOPTION OF DOC.IT SUITE

Our firm's document management and storage has improved 100 percent since implementing Doc.It.

Before Doc.It, our file storage was in a room the size of an oversized triple-car garage, extra deep, filled with boxes of paper. We would keep two prior years of client files on-site. Every year between Christmas and New Year's, we would box up the oldest prior year files that are on-site, log each file into an Excel storage list and haul 50 big banker boxes to the storage unit. The next summer we would return to the storage unit, sort out the old prior year boxes of files that have reached their retention period and prepare them for shredding. Every year these tasks would take at least a month of administrative time; today no one wants to do that.

Now we scan and shred!! We no longer haul any paper boxes to storage. Doc.It has made this piece of administrative work go away.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

Since implementing Doc.It over three years ago, it is hard for us to envision how we got our work done before the implementation of Doc.It. Since there's always a possibility of staff changes, we feel it is critical that there always be more than one Doc.It champion in your firm who know how Doc.It is setup to work effectively and efficiently for the entire firm.

THE TOP REASONS WE RECOMMEND DOC.IT SUITE

- Time-savings.
- Storage saving.
- Retrieval of documents is so easy.
- Doc.It Autofiling, Workflow and Auto Due Date features are huge time savers for everyone.
- Their Tech support is awesome, they are my best friends! When I call them, they can remote-in and fix any issue, fast. They are also willing to technically enable our firm's Doc.It champions to troubleshoot what they believe we can fix in-house before calling them.

Lutz and Carr CPAs LLP

“WE ARE MORE ORGANIZED AND FILES ARE EASILY ACCESSIBLE. I RECOMMEND DOC.IT.”

– Martin Berkowitz, Partner

OUR IT SOLUTION

We have an in-house IT person and an outside consultant. When we bought Doc.It Suite we spent a month getting the firm ready followed by 2-3 days of training.

THE ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT

There was a ton of paper floating around the office; filing and locating documents was an issue.

THE PROCESS I FOLLOW THAT RESULTED IN THE DECISION TO BUY DOC.IT SUITE

The partners realize there is an issue we need to get ahead of. Regarding our adoption of Doc.It, we needed to get control of paper. From the point in time when we realized we have an issue to the point of buying software to resolve it can take approximately a year.

The process I usually follow:

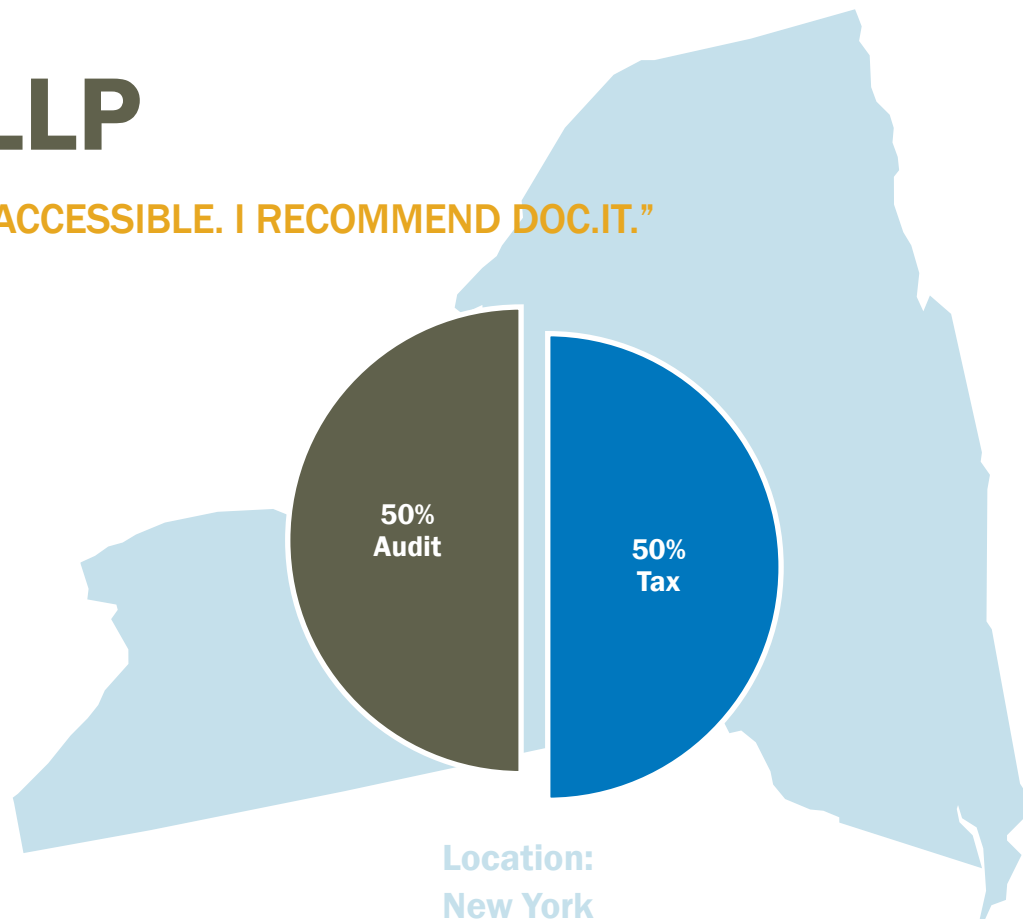
- The partners reach a consensus that a solution is needed.
- We contact vendors and gather information.
- All partners demo the software at the same time.
- The partners agree on the best solution.

WHAT HAS IMPROVED IN OUR FIRM SINCE THE ADOPTION OF DOC.IT SUITE

- We can now find our documents easily.
- We are more organized and files are easily accessible.
- I can answer clients quicker.
- We started with Doc.It two years ago and our paper room is only 1/3 the size it used to be.

THE TOP REASONS WE RECOMMEND DOC.IT

- The transition to Doc.It was almost painless.
- You will be able to easily find documents and files.
- Everyone seems to be well-adjusted to using Doc.It.



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
ProSystem fx Tax
ProSystem fx Engagement

50

Doc.It® licenses



WEBINAR

For Accountants & Tax Professionals

OPTIMIZING WORKFLOW & DOCUMENT MANAGEMENT EFFICIENCY

WHO SHOULD ATTEND? Those who want to realize one or more of the following benefits:

- Improved client service.
- Improved workflow and efficiency.
- Improved security.
- Use of time saved to build high-value services areas.
- Improved workflow and added efficiency; pushing more work through the firm.
- Never miss a deadline.
- Enhanced email management.
- Data accessible in one place, documents are not lost.
- Reduce the number of software applications in the practice without sacrificing functionality.
- The trusted source in the event of document discovery orders or litigation.
- Easy to onboard and train new staff.

www.doc-it.com/webinars

EARN ONE FREE CPE CREDIT



Watch These Videos



FAQs About Doc.It® Suite

1. Do you have a trial version?

No we do not offer a trial version. Doc.It is customized for your firms needs and we advise training before using it.

2. Will Doc.It work with my other software programs?

The general answer to this question is yes. Our clients use accounting, tax, time and billing, bookkeeping and other types of software from all vendors in the channel. If you would like to speak about the software applications being used in your firm, please connect with a Doc.It representative.

3. What happens with my “old” documents?

If you are using an existing software solution, we can convert the data and move it out of the existing solution and into Doc.It Suite for a fee.

If you are not currently using a solution or if you are paper-based or storing in Windows Explorer folders, Doc.It would not be involved in the conversion. We can suggest the best way to handle this.

4. Can I access documents if I work from home or offsite?

Yes, there are various methods to access your documents from anywhere.

5. Does Doc.It have Time & Billing (T&B) tools?

Doc.It does not have a T&B application but it does integrate with your T&B software. You can also track time spent using the Doc.It Suite Workflow module. Practitioners using our software will print invoices/statements out of their T&B software to store in Doc.It Suite.

6. What if I have part-time/seasonal staff?

You only need to pay for part-time staff for the limited time they are using Doc.It Suite.

7. Do I have to use the whole product or can I use the parts I need?

Document management is the base product, you can opt to use this module alone or add any of the additional modules at no extra charge. You cannot use the Doc.It Web portal, Workflow or PDF Editor without implementing the base document management solution.

8. How does your product compare to competitors products?

Competitors offer a wide variety of products and features. Vendors vary in what they charge for licenses, installation, and training and upgrades post-installation.

It is our goal to help you fully understand our “no surprises” all-inclusive subscription model price. We will help you better understand the features, function and cost of our software compared to competitors.

9. What happens to our data if we choose to leave Doc.It?

You can leave Doc.It anytime and easily take your data with you.

10. How does billing work?

Doc.It invoices quarterly.

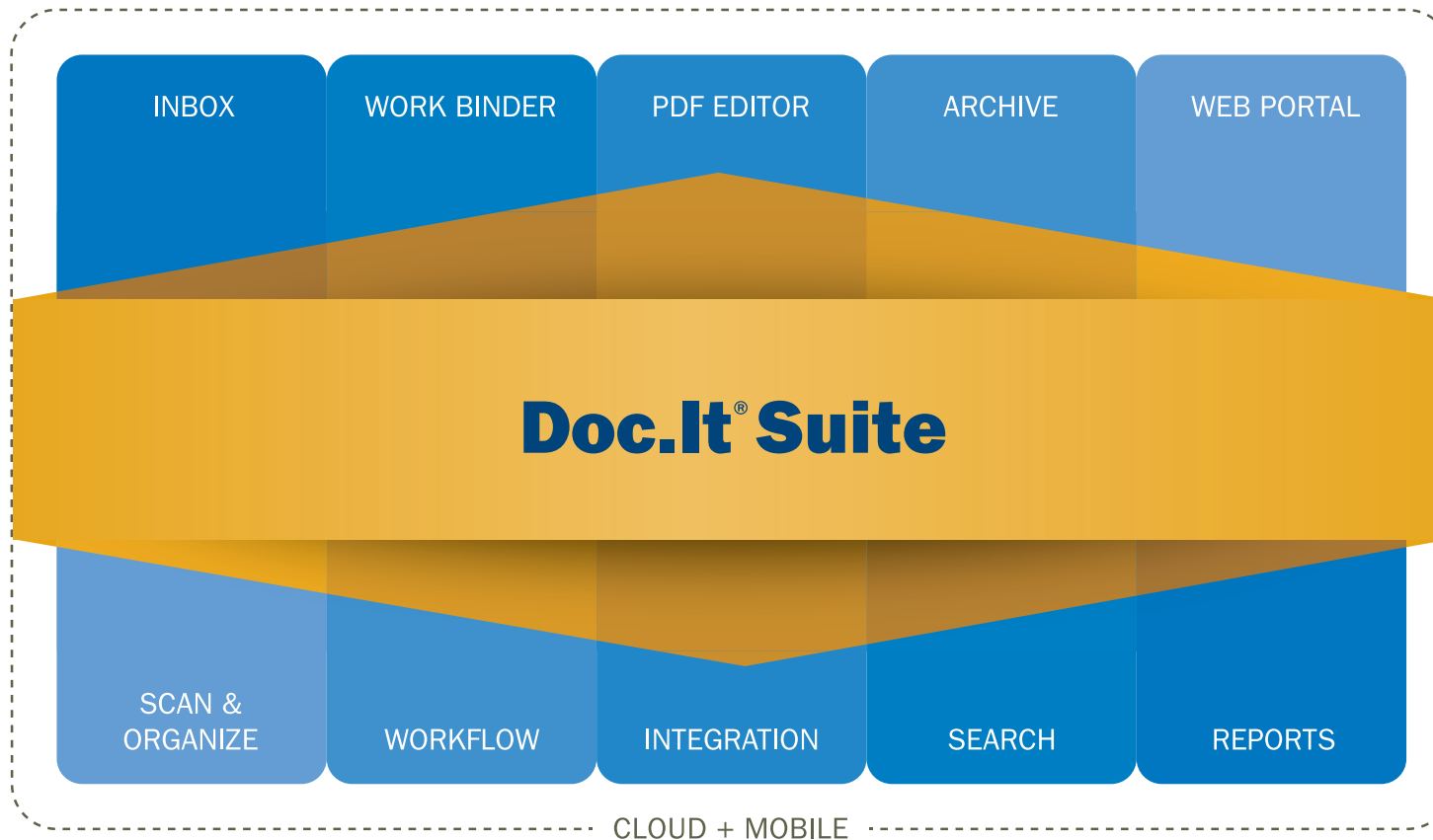
11. Where are documents stored?

On your server or in the cloud.

12. Do I need to subscribe to Doc.It Suite to get Doc.It GO mobile app?

Yes. Doc.It GO works in conjunction with Doc.It Suite.

A Full Suite of Document Management, Workflow and Document Storage Products for Accounting and Tax Professionals



Our technology
scales to fit your firm
while seamlessly
integrating with your
accounting and tax
software.

COMPREHENSIVE INTEGRATED SOLUTIONS

With Doc.It® Suite document management products at work in your accounting firm every document and file will be at your fingertips whenever you need it, which makes users more productive and firms more profitable. Our professional installation, training, and customer care team ensure seamless integration of Doc.It® Suite resulting in firm-wide standardization. Your firm will be more successful with Doc.It® Suite.

Doc.It® MAIN DASHBOARD

Streamlined workflow with centralized access

Doc.It® INBOX

Temporary storage and routing utility

Doc.It® SCAN AND ORGANIZE

Identify, name and organize documents

Doc.It® WORK BINDERS

Organize documents of all types

Doc.It® WORKFLOW

Notification of a document's status

Doc.It® PDF EDITOR

Annotate, bookmark, merge, link pages, append, and highlight

Doc.It® POLICY MANAGER

Publishing tools

CLOUD + MOBILE

Everywhere you need it, when you need it

Doc.It® ARCHIVE

Store fully-indexed searchable PDF files

Doc.It® WEB PORTAL

Secure exchange of files with clients

SEARCH

Find any word in any document

REPORTS

Easy creation of custom reports

Doc.It® GO

Mobile app



723 South Casino Center Blvd., 2nd Floor
Las Vegas, NV 89101-6716

1425 Cormorant Drive, Suite 201
Ancaster ON L9G 4V5

888-693-6248 or 905.547.1100
www.doc-it.com

© 2017 Doc.It® all rights reserved