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*From the April/May 2006 [Review of Document Management Systems](#)*

Acct1st is designed specifically for the tax and accounting firm environment as an enterprise-level solution that can support the needs of larger firms.

Julie Fry, CPA, of Dallas-based SalmonBeach & Associates, PLLC ([www.salmonbeach.com](http://www.salmonbeach.com))

decided on Acct1st because it was created for accounting firms. "The support provided during the implementation and thereafter has been great," she says. "The system now integrates directly with VPM (formerly a CPASoftware product, now part of the CCH family), and new clients who are added to VPM are directly added to Acct1st."

Fry notes that the most beneficial aspect of Acct1st for her firm has been alleviating paper and storage problems. They now have immediate access to prior-year

information and e-mail capabilities from the system. "We \*.PDF the tax return directly from our tax program and store it in Acct1st, eliminating a 'hard copy' for the permanent file," she says. "This cuts down on processing time." The firm is also doing the same thing with the audits it prepares. "We are hopeful that in time we will electronically send out these reports, reviews and tax returns to the clients."

Fry advises firms that are considering implementation of a document management system to look at the present and move forward: "If you start thinking about how much needs to be done, you will never get started. The more diligent you can be in the initial set up, the easier your implementation will be. I

think that we made a mistake by making too many classifications. The last thing

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PLLC is a regional firm that has been in operation since 1987 and currently has a staff of approximately 23 employees.

### **Installation & Configuration — 4 Stars**

This system is designed to run in a SQL environment with an option to run via web connection without an IIS server because it has its own built-in web service. As an alternative, the vendor offers a hosted option, as well.

### **User Interface — 5 Stars**

Acct1st offers a number of features that allow the user to enhance the interface, including user-defined buttons for pre-saved searches, and sorting and selection of columns in the document hit list. A particularly nice feature is the ability to define what information is displayed in the hit list based on the document type. There are three main ways to bring documents into the system: right-click from Explorer, drag-and-drop from e-mail, and automatically based on file type, such as a tax return \*.PDF. As part of the setup, the vendor can develop scripts to automatically index and file existing documents based on the folder properties to which the files belong. Overall, the system is very strong in its capabilities to bring in documents in bulk or batches. Another unique feature is the ability to export documents to a CD and distribute with a royalty free viewer.

### **Integration — 4 Stars**

As previously noted, the software has direct integration with VPM, which is now part of the CCH family. This feature will automatically pull client name and number information from VPM. An API (Application Program Interface) and SDK (Software Development Kit) are both available to develop integration with third-party software applications. Acct1st is a Certified Integration partner with Sage. The system does not offer a virtual \*.PDF print driver to generate \*.PDF output from other applications and file them into the system.

## **Training & Support — 4 Stars**

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User-defined fields can be established to set up a customized workflow with various routing rules established.

## **Security — 5 Stars**

Permissions can be set to view or edit documents based on the user, groups, folder (document category) and document type. Records management and retention is a core feature of the system. Retention rules can be established and applied to both files and scanned images. An unlimited number of retention schedules can be established based on document type or policy. When a document is destroyed, you can determine whether or not the metadata (indexing values, etc.) are maintained

for an audit trail or destroyed with the document/file. In addition, documents can be put into an “on hold” status during litigation, which means the selected documents cannot be edited and the retention schedule is suspended.

## **Pricing — 5 Stars**

The base price is \$250 per user license with a 20 percent annual maintenance and support fee. Alternatively, the hosted solution is priced at \$50 per user per month. On-site services are priced at a very reasonable \$500 to \$1,000 per day.

## **Relative Value — 4.5 Stars**

Acct1st is a strong solution, and the company is committed to the practicing public accountant. The information they provided for this review demonstrates that they have a solid understanding of the marketplace. This is a strong package that can compete with some of the better known systems.

## **2006 Overall Rating — 4.5 Stars**

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