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*From the July 2009 Review of* Document Management Systems

Acct1st continues to market its product as a $1 per day, per user solution. And while the pricing model hasn't changed, some of the usability and functionality has.

**USABILITY:**
The Acct1st interface has evolved very nicely with its latest release. The primary interface offers a nice balance between providing direct access to most of the system's functionality without overwhelming the user. The interface consists of a simple set of tool buttons along the top and a file search window along the left side, which is organized into four tabs to provide alternative methods to search for files. The main document view window is organized by custom tabs that you define to organize the way you want the list of searched files (hit list) to appear. This is pretty effective. In the example demonstrated for me, there was a Tax View tab that displayed the files according to the parameters that the tax professionals would normally focus on and a Bookkeeping view for those engagements. The hit list columns can be arranged in any manner that you prefer.

**FILE ORGANIZATION/MANAGEMENT:**
The primary method of organization is by client and filename. From there, you can choose from literally dozens of ways that you want to search and display the files: document type, document name, engagement code and many more. As previously noted, with the ability to set up custom tabs for organizing files, you should have no trouble finding the files you want. Using the engagement code field as a search filter lets you get a list of all the files related to a particular client engagement, which is probably the most natural method for organizing files.

**INTEGRATION:**
Acct1st is what we refer to as an "accounting centric" EDRMS (Electronic Document

and Records Management System). That means that it is designed specifically for use

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improved over the previous release that required you to save the file to Windows Explorer and then move it into Acct1st. A new batch check-in feature for Outlook lets you select multiple email messages to import simultaneously.

Additional integration tools include a workflow system that is based on setting up an engagement folder to organize related documents, and you can design templates for unique processes, i.e. tax return preparation, audit, compilation, etc. A separate portal module is available that stores the published documents in a separate repository at the Acct1st data center in Atlanta, Georgia. Tic, Tie and Calculate is a handy utility module that provides custom bookmark templates, tick mark stamps, and other annotation tools specifically designed for accounting and tax documents.

**RELATIVE VALUE:**
Acct1st offers a comprehensive solution at a reasonably priced $1 per user, per day model — $365 per user, per year for a web hosted solution that includes the server infrastructure and network administration. The portal and Tic, Tie and Calculate add-ons are available for additional fees.

**2009 OVERALL RATING:**

Technology

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