

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

2011 OVERALL RATING ★★★★★

★★★★★ CORE PRODUCT FUNCTIONS/FEATURES

★★★★★ DOCUMENT WORKFLOW

★★★★★ DOCUMENT CONTROL

★★★★☆ SPECIAL FEATURES

888-693-6248

www.doc-it.com

2011 Overall Rating 5

Best Firm Fit:

Due to the robust feature set incorporated into Doc.It to support workflow automation and scheduling, it is best suited for firms that are prepared to work towards fully automating their business processes. The benefits of doing this are greater for larger firms that typically have more staff members involved in the typical engagement. Small firms and sole practitioners are less likely to be able to fully utilize the depth of functionality. However, a sole practitioner can benefit from binders and an archive, as well, so Doc.It Suite can work equally well for smaller

firms. If your firm has a lot of “team based” engagements, Doc.It is well suited for

Hello. It looks like you’re using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

- On-the-fly PDF security option settings
- Implementation methodology

Potential Limitations

- Requires copying files to portal, rather than linking them
- Lack of a SaaS offering at this time

Executive Summary & Pricing

I have reviewed Doc.It DM annually for the past five or six years, and I’m impressed with how the system has evolved into such a comprehensive solution. It is built on a solid foundation with the WIP binder and archive repository model. It is a strong system for firms that are committed to digital workflows. Doc.It is priced at \$35 per month per user for the entire suite, which includes Doc.It DM, client portal, workflow, scanning and more.

Product Delivery Methods:

☒ On-Premises

☐ SaaS

☐ Hosted by Vendor

Core Product Functions/Features – 5

Document Workflow – 5

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us