for firms of all sizes. Doc.It offers excellent document management capability, as well as a variety of other features such as Workflow, Archive, PDF Editor, Web Portal, ...

**Mary Girsch-Bock** • Dec. 18, 2017

**Doc.It Suite**

[www.Doc.It.com](www.Doc.It.com)

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Doc.It Suite is a sophisticated document management software that is well suited for

one fixed fee. The Inbox serves as a temporary repository for all files, which are saved in their native format. Once in the Inbox, users assign proper naming conventions and can add notes prior to routing documents to coworkers, to other binder systems, or to the Work Binder folder. Unlike many other document management applications, Doc.It stores files in two ways; in the Work Binder and in the Archive. Documents that are currently being worked on are placed in the Work Binder where users can easily access them for editing or routing to the appropriate parties. Once work has been completed on the documents, they can be routed to the Archive, where they are stored as a fully-indexed bookmarked PDF file.

Prior to going live, firms work with Doc.It personnel to determine the best file structure to utilize for their firm. This structure is then incorporated in the folder structure that will be used going forward. A long-term storage policy is also incorporated this time, and the Policy Manager guarantees documents are handled with consistency across the firm, ensuring appropriate policies are applied to all documents.

Users can opt to use the drag-and-drop function to save documents, and the Scan and Organize module makes every scanned document fully searchable by using optical character recognition (OCR). To easily organize scanned files, Doc.It uses AFR which recognizes a variety of document types, helping to ensure that all scanned documents are properly named.

Doc.It allows users to check documents in and out of the system as needed, with the ability to create multiple versions of each document. The PDF Editor allows users to quickly markup PDF's and handle common actions such as annotations, bookmarks, appends, and attach a calculator tape to the document, as needed. Document Publishing allows users to create a permanent version of the document when edits have been completed. This permanent published version is saved as a PDF, then placed in the Archive for permanent storage.

Doc.It's Web Portals allows firms to securely email documents to clients, share

& Organize, Web Portal, Work Binders, and Workflow. The main dashboard allows users to easily access and manage documents from a variety of sources. The product also offers solid integration with a variety of third-party applications.

For those interested in Doc.It, the website offers a variety of information and resources including short videos that explain each module, a downloadable product overview, along with free webinars that explain common problems. A brief product demo is also available, as are Case Studies, White Papers, and eBooks.

Doc.It Suite customers receive training, software training tune-up (live) webinars, on-demand recordings, and unlimited telephone and email support. Doc.It is involved in the entire implementation process, which can take between 5-6 weeks or longer, depending on the needs of the firm. Training is also conducted during the implementation process as well.

Doc.It Suite is available on a subscription basis, with flexible pricing options available. Firms typically pay between $25 to $35 per person per month, depending on the number of licenses required. Subscription pricing includes all modules within Doc.It Suite. A long-term contract is not required, with users able to stop the subscription at any time. There is a separate fee assessed for product implementation and training. The regular subscription price includes unlimited phone and email customer support, all product updates and upgrades, free access to pre-recorded training videos and resources, unlimited portal client logins, and integration with third party software applications.

## 2017 Rating – 5 Stars

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