CPA
Practice**Advisor**

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Doc.It Suite

www.Doc-It.com

From the 2018 reviews of Document Management and Documents Storage Systems for accounting firms.

Doc.It Suite is a powerful, scalable document management and storage product that

started with Document Management: Doc-It Explore is an affordable way to start managing files via Work Binders, and includes a feature-rich PDF Editor and OCR Scanning technology.

Doc-It Connect allows firms to connect with their clients via a Web Portal, secure email, unsecure email and Prepared by Client lists while managing files in Work Binders.

Loaded with a variety of features, Doc.It Suite is an all-inclusive application that allows users to utilize any or all product modules as needed for one monthly fee. The Inbox functions as a temporary digital storage location for all printed or scanned PDFs. This allows users to quickly store documents and funnel them to the correct location at a later time. Users can label documents for routing to associates or to a work binder. The Work Binder, along with the Archive, is where all documents are stored. Documents currently being worked on are stored in the Work Binder, which are organized according to the needs of the firm. Once work has been completed, documents are typically routed to the Archive, where a firm-defined retention policy can be applied to all archived documents. Users can easily locate archived documents by simply entering the client name, which will immediately display all the files associated with that particular client.

Doc.It personnel assist firms with creating the best file structure for their firm needs. Once this is determined, the structure is automatically used in all folders going forward. Firms will also work with Doc.It to create a document storage policy in the Policy Manager application, which includes naming structure, storage type for each document, and retention policies which includes a list of all documents that are due to be purged. The Policy Manager feature also ensures that any policies created are followed firm-wide.

Doc.It's Scan and Organize tool lets users create completely searchable documents

Once a client engagement is completed, Doc.It automatically publishes the client binder to PDF, which allows for easy sharing of the documents as well as secure client delivery via the portal or email.

A fully integrated workflow system allows for the routing of tasks, assigning of work and management oversight of all projects. Even external projects done in CaseWare or Fx Engagement can be managed by the workflow. Due date compliance and project oversight are tracked in a detailed reporting system. Users can create real-time reports, in addition to system provided reports and widgets, that are be deliverable to the screen or to Excel for further manipulation and filtering.

For firms that wish to share files with clients, Doc.It offers Client Web Portals that are firm-brandable. The portals are bi-directional offering both document upload and download capability, and supports files of any size. Clients receive an initial password, which they can then manage from their end. An automated email alert is sent when a file has been added to a client's portal.

Doc.It Suite includes Cloud and Mobile Capability, Document Archive, Document Publishing, the PDF Editor, Inbox, Policy Manager, Reports, Scan & Organize, Search, Web Portals, Work Binders, and Workflow. The product also offers integration with third party software including Caseware, Microsoft Office, and CCH ProSystem fx Engagement, as well as a variety of other applications.

Doc.It customers have password protected access to the Doc.It knowledgebase as well as a variety of pre-recorded training videos. videos, The Resources page includes introductory videos, white papers, case studies, and product downloads. A pre-recorded product demo can also be accessed the Doc.It website. Product support is available during extended business hours via telephone and email.

Mentioned earlier, Doc.It personnel are completely involved in the product

2018 Rating – 5 Stars

Firm Management • Hardware

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