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Suite includes a client portal, workflow tools, work binders, and a PDF editor. Doc.It ...

Mary Girsch-Bock • Sep. 16, 2019



Doc.It Suite

Doc. It

www.Doc-It.com

From the 2019 reviews of [Document Management and Storage](#) systems for accounting firms.

Doc.It Suite is a powerful, scalable document management and storage application designed for accountants, and well suited for accounting firms of any size. Doc.It Suite includes a client portal, workflow tools, work binders, and a PDF editor. Doc.It

Suite offers a variety of deployment options, including an on-premise cloud, a hosted

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purging criteria created in the module and subsequently applied to any file created.

The Doc.It Suite Inbox is used to temporarily store and later route documents to the correct location. The Inbox is used for any printed or scanned documents, where they will be appropriately named using the naming convention assigned earlier, and then routed to a co-worker, work area, or permanently stored in the appropriate location. Any document currently being worked on is stored in the Work Binder, which stores documents in their native format, and automatically organizes documents in the firm-defined structure for easy access and review. Users can access multiple binders simultaneously, with the system supporting multiple monitors. Once work on a file has been completed, the Document Publishing tool will create a PDF snapshot of all of the related documents, combining them into an indexed, bookmarked PDF. Later, documents are routed to the Archive, where they are securely stored. Archived files can be located by entering the client name, which will in turn display all files for that client.

Doc.It's Scan and Organize tool is used to make all documents scanned into the application fully searchable using OCR technology. Doc.It also uses Automatic Form Recognition (AFR), which automatically names all scanned documents and files them in the correct folder. Once that is completed, the documents can be moved to the client's individual work binder. Any document scanned into Doc.It Suite become automatically text searchable.

Doc.It Suite also contains workflow capability, allowing managers to view active project status, view related dates and history of all activity, and check the status of any engagement, while the fully integrated PDF Editor allows users to annotate and bookmark documents, merge documents, link pages, and highlight documents as desired. The PDF Editor also allows users to easily create fillable PDF form for more convenient gathering of data.

For firms that wish to share files with clients, Doc.It Connect is available. Doc.It

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that include Cloud and Mobile Capability, Document Archive, Document Publishing, the PDF Editor, Inbox, Policy Manager, Reports, Scan & Organize, Search, Web Portals, Work Binders, and Workflow. Good integration with numerous of third-party applications including Caseware, Microsoft Office, and CCH ProSystem *fx* Engagement is offered as well.

Doc.It Suite personnel are involved with the entire implementation process, from initial consultation to product implementation and training. System users have access to resources such as introductory videos, case studies, downloads, and white papers. A password-protected knowledgebase is also available, as are pre-recorded webinars. Product support is available via email, chat, or telephone, with extended support hours available during tax season.

Doc.It Suite starts at \$35.00 per license for up to 40 licenses, with the price dropping to \$25.00 per license. Doc.It Explore, which is a great entry level document management application for smaller firms starts at \$20.00 per license per month. Doc.It Connect, the client portal, runs \$15.00 per license per month, with training and product implementation fees extra. All support is included in the subscription cost. Those interested can also access a pre-recorded product demo to learn more about features and functionality.

2019 Rating – 5 Stars

Firm Management

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