WHO'S WHO

AMONG THOSE SERVING THE TAX & ACCOUNTING PROFESSION

DOC.IT

DOCUMENT MANAGEMENT

Doc.It

Address:
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89101-6716

Canada
1 Hunter Street East,
Hamilton, ON L8N 3W1

Phone:
888-693-6248 (Ext. 1)

Web Address:
www.Doc-It.com

Number of Employees:
25+

Year Founded:
2000

COMPANY OVERVIEW

Doc.It (www.doc-it.com) leads the paperless document management industry with Doc.It Suite, the most comprehensive and affordable Document Management Software (DMS). Doc.It Suite is the DMS of first choice for accounting firms of any size that are ready for innovation and increased profitability.

Doc.It® Suite, 5-star award-winning DMS, manages the workflow of documents, intelligent scheduling of work, filing, and the effortless retrieval of documents stored in the most powerful and intelligently designed PDF Archive in the industry.

With the entire Doc.It® Suite costing about one dollar a day per person, Doc.It® leads the industry with the lowest total cost of paperless DMS. Doc.It is a scalable solution for firms of all sizes.

MARKETS SERVED

Public accounting practices and Bankruptcy and Insolvency firms of all sizes throughout North America.

PRODUCTS

The Doc.It® Suite includes:

- **Doc.It Web Portal:** The Web Portal provides a secure channel of communication for easy file transfer between Doc.It customers and their end clients.
- **Doc.It Archive:** The Archive serves as an electronic version of the accountant's paper file room. All finalized engagements and documents are "published" to the Archive for long-term retention as a single, fully-bookmarked and indexed PDF. The Archive is organized using a standardized client folder structure defined by the accounting firm.
- **Doc.It Publisher:** The Publisher creates a single, fully indexed and bookmarked PDF for each finalized engagement. The resulting "published" PDF is stored in the Doc.It Archive for the appropriate retention period.
- **Doc.It Binder:** The Binder ensures work-in-process engagement documents are organized into single and secure electronic binders for efficient processing and collaboration.
- **Doc.It Scan and Form:** This technology recognizes forms, names, and organizes an unlimited number of document formats such as tax slips, invoices, or any other form type.
- **Doc.It PDF Editor:** PDF Editor allows accounting firms to forego the expense Adobe Acrobat licenses by serving as a complete replacement for Adobe Acrobat with all of the tools the accountant needs.
- **Doc.It Workflow:** Workflow ensures efficiency in the task of scheduling through easy and intelligent "smart scheduler" task assignment, staff load-balancing, tracking, and reporting.
- **Doc.It Tax and Accounting Software Integration:** Doc.It technology integrates with other applications your firm is already using.

CUSTOMER SUPPORT

Doc.It partners receive world class professional services and support. Customers are provided with pre-implementation project planning, support, and post-implementation free unlimited access to web-based training videos.

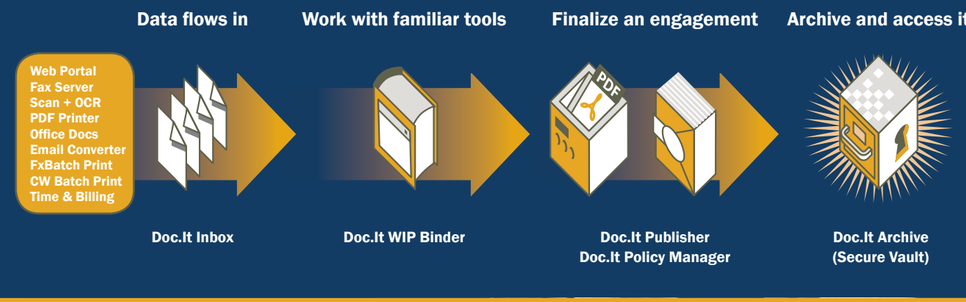
CPA Practice Advisor
★★★★★
STAR RATING

CONCERNED ABOUT PAPERLESS EFFICIENCY?

We are too.
No other document management technology can make your partners and staff as efficient.

We are the paperless solution of first choice for firms of all sizes.
Doc.It provides more than technology. We provide methodology, best practices, policies, user training, and more.

We empower partners and staff with client data at their fingertips.
Doc.It Suite allows for instant access to **ALL** client data.



PAPERLESS ALREADY?

Has going paperless made it easier to work with your clients?

- Document storage is not document management.
- If it has not gotten easier or increased efficiency, then you need to call us.
- Doc.It does it right. Just ask our customers. Really, just ask our customers.

CALL TO PREVIEW DOC.IT TODAY. 888-693-6248 (Ext 1) | www.doc-it.com

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