

# A Paperless DM Vision Became a Reality.

## REAL PEOPLE. REAL RESULTS.

**CLEARWATER, FLORIDA** – Ten years ago, I envisioned working productively from almost anywhere. I wanted to make life easier during busy season by being able to go home and have dinner with my family and then be able to work seamlessly into the evening hours from my home office. Since then our firm transitioned to paperless DM with Doc.It, and today, it is such a joy to actually have the capability to work effectively in this way.

### Tax Season Became Much Easier

During the busy tax season, my life is now much easier and I am working in the way I want to work. From my home office, I login to my office server through a Citrix connection to review and correct tax returns with the tax preparation software viewable on one screen, while viewing all of the client's scanned documents on the other. When I finish reviewing a return, I click "print" and our accountant's copy is preserved as a PDF file in Doc.It, the government copy is queued for e-Filing, and the client copy prints on our office printer, regardless of whether I'm working from home or at the office.

### Working with a Competent and Experienced DM Technology Provider

Doc.It is a competent and experienced DM technology service provider that designed the right hardware configuration for our practice. There are a variety of vendors offering paperless document management software, with only a select few including Doc.It, providing all of the features and capabilities we define as highly desirable.

### The Practical Benefits of Doc.It's Paperless DM Technology

One of the many practical benefits we have experienced in using this technology includes not having to jump up from our desk to go to the shelf to find a needed file. To retrieve a file I click into our DM system to view in seconds, our client tax returns, financial statements, workpapers, correspondence, engagement letters and billings.

### Examine the Hardware, Software, and People

If you have dreamed of working in the way that I have described, the successful transition to becoming a paperless practice can be a reality in your firm. I recommend contacting Doc.It and performing due diligence by examining the three major components that will be most highly impacted by your firm's paperless DM evolution: hardware, software and people.

#### HARDWARE

- ✓ One or more file servers
- ✓ One or more scanners
- ✓ Three monitors at every workstation

#### SOFTWARE

- ✓ Scanning with OCR functionality
- ✓ The ability to organize documents in folders and subfolders and to rearrange them during preparation and review of tax returns and financial statements
- ✓ The ability to annotate and mark documents
- ✓ Storage of documents in a logical structure
- ✓ Use of a standard (vendor-independent) file format
- ✓ The ability to change spreadsheets and Word documents in the client folder while preparing and viewing workpapers

#### PEOPLE

- ✓ Processes and procedures for file structure, efficiency and easy retrieval
- ✓ Pre- and post-installation training to allow team members to take full advantage of all of the features of the software and shows them how to economize their time by using shortcuts
- ✓ Monitoring of work product to insure process and procedure compliance

#### Bollenback & Forret, pa



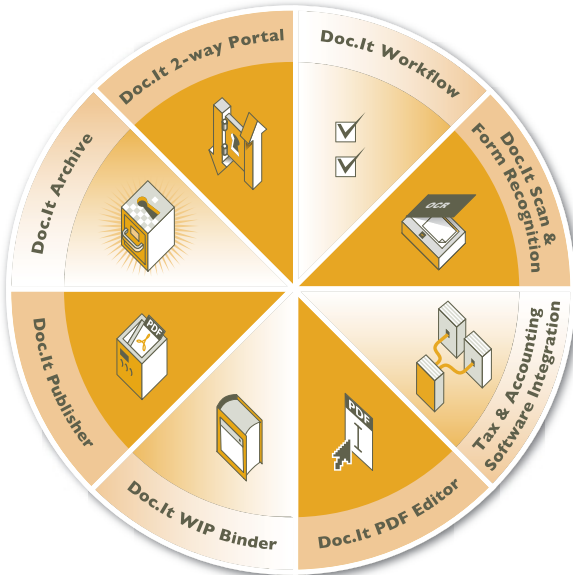
**Rick Stuart, CPA, CFP**

*The most expensive aspect of DM technology is not the actual cost of the software; it's the amount of time and effort that you will invest setting up the process and defining the procedures, including training staff and converting files to the new DM system. We investigated DM systems from six major vendors, and chose Doc.It because their technology had the most flexibility and adaptability for our firm. - Rick Stuart, CPA, CFP*

# THINKING ABOUT GOING PAPERLESS?

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Your documents are your firm's most important assets. As a responsive partner, we deliver a complete end-to-end solution and professional service for your document management needs.



A partnership with Doc.It® includes paperless pre-planning, software, training, implementation services, and ongoing support for offices with up to 500 users.

At about one dollar a day per person, Doc.It® provides complete digital DM and workflow solutions for public accounting practices, including software, training and implementation services developed by accountants for accountants. Unlike other paperless technology providers, Doc.It® does not require users to choose between modules, purchase Adobe Acrobat licenses or SQL databases and hardware. Doc.It Suite is the lowest-priced paperless solution available.



## FIVE-STAR FOR THE RIGHT REASONS:

### USABILITY:

How easy the system is to interact with.

### FILE MANAGEMENT & ORGANIZATION:

The methodology the system utilizes for organizing the electronic documents.

### INTEGRATION:

MS Office, accounting and tax applications, and extended applications such as intelligent scanning, workflow, and portal modules.

### RELATIVE VALUE:

The breadth and depth of functionality relative to the cost of the system.

**Integration is a critical aspect of document management technology.** Doc.It® Suite integrates with Microsoft Office and time & billing software to synchronize client information. Doc.It® Suite also includes a full set of PDF tools including our own Doc.It® PDF Editor and Composer with full annotation capability. These document assembly tools can merge, split, append, or remove pages from PDF documents. Expensive Adobe Acrobat licenses are not required because the Doc.It® Suite handles these tasks with ease.

Doc.It Suite, which uses the universally-accepted PDF technology, requires no third-party licenses (such as SQL), and has the ability to capture, convert, and archive any paper, fax or electronic document into PDF format. You can also add diarized notes, mark up individual pages and electronically sign documents. The system also manages your e-mail through direct integration with Outlook. The Suite has powerful search engine, uses a familiar folder format, and also supports multiple office locations and remote access with full support for Terminal Services and Citrix.



FREE WEBINAR



## GOING PAPERLESS webinar hosted by Roger Mongeon

**Earn 1 CPE Credit!**

Reserve your virtual seat in this 60-minute webinar and learn what you can do today to start your transition to paperless. Experience the **NEW Doc.It Suite 3.3!**

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