

Joseph P. Handy CPA PLC

DOC.IT IS NOT JUST ANOTHER DESKTOP APPLICATION FOR US; WE EMBRACE IT AS THE PLATFORM WE PRACTICE ACCOUNTING ON.

WHY WE SOUGHT OUT DOCUMENT MANAGEMENT SOFTWARE

- 1) We were seeking out a more organized and efficient way to work.
- 2) We wanted a business platform and archive system.

Before Doc.It, we were a traditional paper-based accounting firm. We used 5-partition binders with the typed Avery label. It was a common practice for binders to sit in a room with hundreds of other client binders. Full binders moved into boxes, full boxes were sent off to storage.

When I was researching document management platforms, I used the Internet and called a few IT friends to check on document management software. I found a lot of archive solutions to store images, but none of them had a business platform with an archive system like Doc.It.

In 2008, we moved to Doc.It and gained a more efficient way to work and we are far more organized. Doc.It provides a more competent way to store and archive completed client engagements.

HOW DOC.IT SUITE HELPS US IN OUR DAILY WORK

Doc.It is the first application to open in the morning and the last to close. Doc.It is the platform for the way we practice. Every document we receive is stored, shared, and worked-on in the Doc.It Binder. Our final work product is stored in the Doc.It Archive. In less than three years, we eliminated our off-site storage.

You cannot put a dollar value on always having your work product at your fingertips or the time and resource savings from never having to send somebody offsite to look for documents.



Location:
North Miami, Florida

AREAS OF EXPERTISE

Accounting
Tax Preparation
Tax Consulting

5

Doc.It® licenses



Learn how and why we chose Doc.It®

OUR DECISION TO GO WITH DOC.IT WAS BASED ON THESE CRITERIA

- Doc.It was responsive: They know their product.
- The Doc.It implementation model is better than all competitors'. Doc.It will evaluate your needs and help you establish policies.
- Doc.It supported their product and they supported migration. Doc.It handles migration better than any competitor.
- Doc.It provides training and support that is hands-on and they provide training videos as refreshers or for new staff to get up to speed. Like any firm, we have had turnover since starting with Doc.It in 2008. With Doc.It, any new staff we have spends two days viewing the Doc.It training videos. There is peace-of-mind knowing new staff can get a comprehensive suite of training right here onsite.

MY ADVICE FOR PARTNERS OR IT PROFESSIONALS WHO CHOOSE DOC.IT

- When you move your practice to electronic workspace you will need to consider your hardware and network. The right way to start with Doc.It is to evaluate your computer hardware and your platform.
- You will need a plan internally. We brainstormed about how we were going to work in the future and decided how we were going to proceed.
- We decided on a cut-over date to start with the Doc.It platform and Doc.It provided us with a great trainer who understood accounting. We closed out the existing jobs using our old practices.

FACTORS THAT IMPRESSED ME WITH DOC.IT

- **CONVENIENCE AND THE ABILITY TO BE CLIENT-RESPONSIVE.** What we gained with Doc.It was the convenience of having every document at our fingertips and the performance of being client-responsive. Anything a client requests is right at your fingertips. You cannot put a price on that; it is intangible.
- **EASE OF WORKING IN THE FIELD.** When one of my auditors works in the field for a week, they have to bring the prior year file and current year Work Binder. We easily transfer both files, the Archive and Work Binder to the auditor's laptop and they have everything with them in the field. Because of Doc.It, we no longer ship a trunk of material to the client location. It all works very well.
- **NEVER LOSE A DOCUMENT.** Our staff was skeptical that we might image and store a document away and not be able to find it, or that it might get lost in the system. Because of this skepticism, we placed a box in the file room to temporarily store any documents we wanted to keep for the next nine months. About four months into the launch we asked if anyone had needed to go into the box to get a "lost" document. No one did. We have been with Doc.It since 2008 and we have never lost a document. It truly is an accountant's worst nightmare to have to go to a client and say, "That really important financial document you gave me? Well, I lost it."

