

Feldstein & Associates LLP

**“WE KNOW OUR DOCUMENTS ARE SECURE;
THEY WILL NOT BE ACCIDENTALLY DELETED.”**

– Judy Burgess, Accounting Tech and Office Administrator

OUR IT SOLUTION

I am our in-house IT manager, we also have an outside IT pro we call upon when needed.

THE ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT

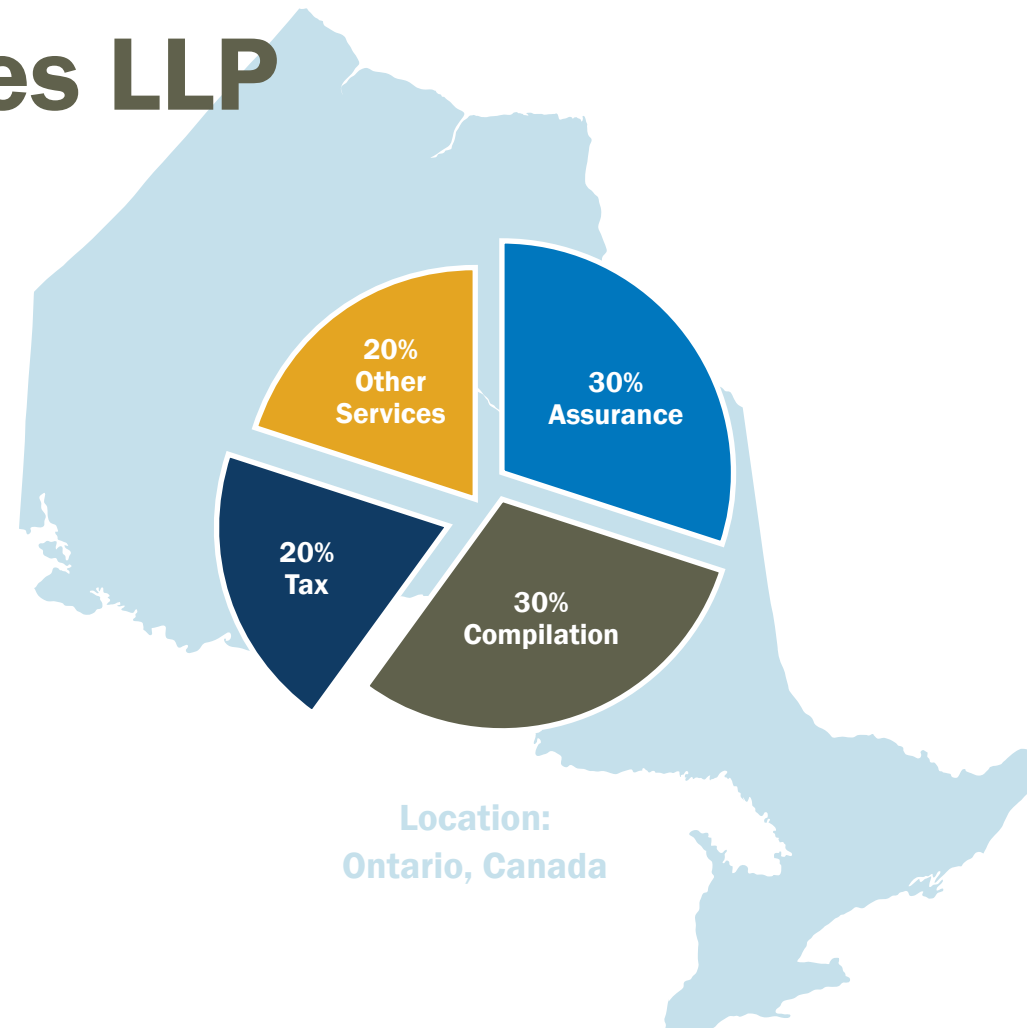
We bought Doc.It after we decided we wanted to go paperless and needed a more secure method for storing documents. Before Doc.It, we were keeping digital files on network where there was risk of someone inadvertently deleting files.

THE PROCESS I FOLLOW THAT RESULTED IN THE DECISION TO BUY DOC.IT SUITE

Our process and timeline for buying new software depends upon how big the change will be. A 6-9-month timeline is common. During the investigation and demos, we bring other people into the discussion to listen to their opinions. The investigation, product demos are handled by the managing partner and me; the final decision to purchase is made by the managing partner.

The process we usually follow:

- Google search.
- Talk to other firms, the peers we know.
- Contact vendors to schedule demos of the software.
- Discuss pros and cons of the software which results in us picking the software. We discuss how much time will be required to make the addition or change, and what changes the firm will need to make.



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
Thomson Reuters DT Max
CaseWare
CanTax FormMaster

18

Doc.It® licenses

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WHAT I LIKE ABOUT DOC.IT SUITE

- We know our documents are secure; they will not be accidentally deleted.
- We like the CaseWare batch print feature, which is required to lock-down assurance engagements.
- We like the AFR process for T1 files.

WHAT HAS IMPROVED SINCE THE ADOPTION OF DOC.IT SUITE

- Our T1 process has improved; the sorting is done before accountants get the T1 files, it is organized for them when they get it.
- We don't have to track down a paper file.
- We are just starting the process of transferring our T1 files and corporate archive files into Doc.It. We are looking forward to this; it will be an improvement and make it easier to send files.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

- Sit in on a webinar.
- Ask a lot of questions.
- Talk to other firms who use Doc.It.

THE TOP REASONS WE RECOMMEND DOC.IT

- Friendly fast efficient customer service.
- Easy to use.
- Security.
- Web portal as a more secure way to send/receive documents and to transfer larger files.