

CPA Group of Laramie

“OUR FIRM’S DOCUMENT MANAGEMENT AND STORAGE HAS IMPROVED 100 PERCENT SINCE IMPLEMENTING DOC.IT.”

– Terrie Anderson, Office Manager

OUR IT SOLUTION

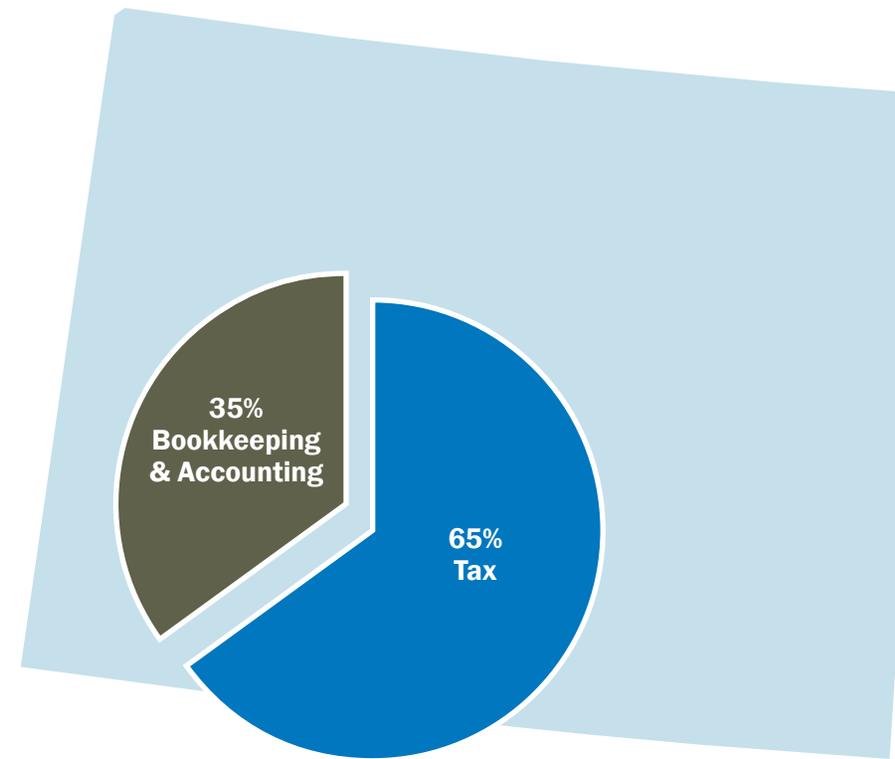
We handle what we can in-house and outsource the rest to an IT firm. When we decided to go with Doc.It, our IT firm worked closely with Doc.It Support personnel to get our servers ready and assisted with the entire process of installation and testing

THE ISSUES THAT FUELED OUR DECISION TO INVESTIGATE DOC.IT

We were using Thomson Reuters’ FileCabinet module which is connected to UltraTax and Practice CS (for Time & Billing). While FileCabinet initially worked pretty well, it started to constantly freeze and crash! We struggled with the ever-growing instability of FileCabinet for about three years before an IT person from UltraTax finally told us that FileCabinet was not meant for a firm of our size. They recommended a cloud version of their UltraTax and FileCabinet but the fee for the cloud version was expensive, and we were not ready to move to the cloud.

We made the decision to emulate File Cabinet’s structure of clients and subfolders-by-year on one of the drives on our server. As a tax return was done, we did a copy/transfer process of PDF documents into the client’s folder. We thought it was working out pretty good until one day about half of our client folders were gone! Someone mistakenly moved the folders from one year to the next. While this was an accident, it was extremely unsettling. That mistake made us all aware of just how fragile and unsecure our self-designed emulation of File Cabinet was and how easily it could all have been deleted.

An ever increasing workload demanded that we take a serious look at a more cost effective and efficient way to do business. Everyone in our firm really likes Doc.It, even those who were initially skeptical at the economic viability of and learning how to use the software. In fact, not one of us would ever consider going back to how we used to do things.



Location:
Wyoming

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
UltraTax
QuickBooks

20

Doc.It® licenses

CPA GROUP OF LARAMIE CONTINUED

THE PROCESS WE FOLLOW WHEN MAKING ACCOUNTING TECHNOLOGY PURCHASING DECISIONS

It takes approximately six months to make a major purchasing decision. We have four partners and 10 accounting and administrative support staff. We try to give everyone who will use the product an opportunity for input before we decide to buy.

The decision process we follow:

- Research the products.
- Demo products.
- Summarize product options and meet with the appropriate managers and staff.
- Identify all aspects of workflow impact. Obtain manager and staff input and remain open-minded.
- Meet with partners and present product options.
- Partners make the final decision.

WHAT I LIKE ABOUT DOC.IT SUITE

- AutoFiling, WorkFlow, Document Retrieval, Report Features
- Templates and setups that can be customized to work for our firm.
- Awesome tech support

WHAT HAS IMPROVED IN OUR FIRM SINCE THE ADOPTION OF DOC.IT SUITE

Our firm's document management and storage has improved 100 percent since implementing Doc.It.

Before Doc.It, our file storage was in a room the size of an oversized triple-car garage, extra deep, filled with boxes of paper. We would keep two prior years of client files on-site. Every year between Christmas and New Year's, we would box up the oldest prior year files that are on-site, log each file into an Excel storage list and haul 50 big banker boxes to the storage unit. The next summer we would return to the storage unit, sort out the old prior year boxes of files that have reached their retention period and prepare them for shredding. Every year these tasks would take at least a month of administrative time; today no one wants to do that.

Now we scan and shred!! We no longer haul any paper boxes to storage. Doc.It has made this piece of administrative work go away.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

Since implementing Doc.It over three years ago, it is hard for us to envision how we got our work done before the implementation of Doc.It. Since there's always a possibility of staff changes, we feel it is critical that there always be more than one Doc.It champion in your firm who know how Doc.It is setup to work effectively and efficiently for the entire firm.

THE TOP REASONS WE RECOMMEND DOC.IT SUITE

- Time-savings.
- Storage saving.
- Retrieval of documents is so easy.
- Doc.It Autofiling, Workflow and Auto Due Date features are huge time savers for everyone.
- Their Tech support is awesome, they are my best friends! When I call them, they can remote-in and fix any issue, fast. They are also willing to technically enable our firm's Doc.It champions to troubleshoot what they believe we can fix in-house before calling them.