

Cassell & Hendricks, CPA, PA

“WE ARE 100% PLEASED WITH DOC.IT SUITE AND WOULD DO IT AGAIN!”

– Branden Daniels, CPA, Partner

OUR IT SOLUTION

I handle IT and we use an IT contractor when needed. When we adopted Doc.It we were ready for the transition; our IT contractor helped for a few hours during the installation of Doc.It.

THE ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT

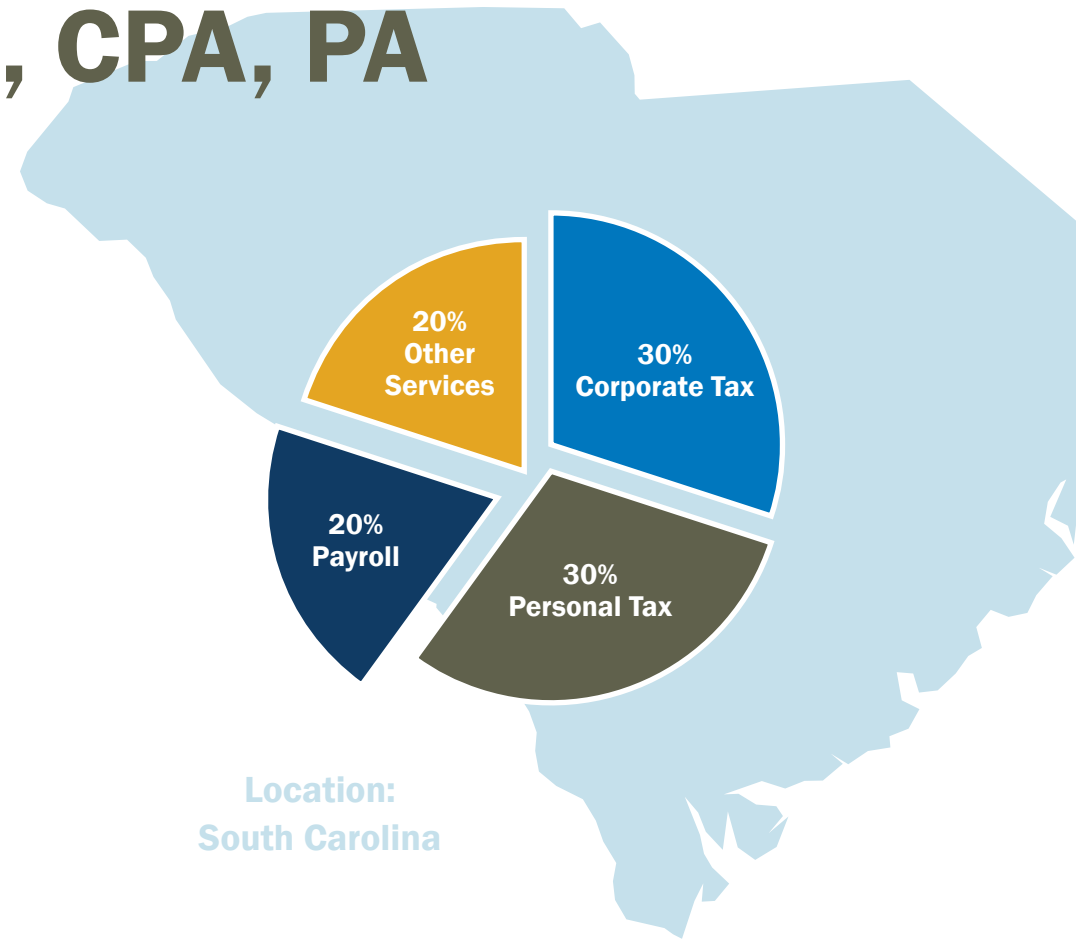
We needed to resolve a few issues we didn't want to deal with anymore. Every year our staff would spend three to four weeks working on shuffling paper around to make room for the next year of paper. Additionally, we were tired of the hassle we went through to access documents.

THE PROCESS I FOLLOW WHEN MAKING ACCOUNTING TECHNOLOGY PURCHASING DECISIONS

It can take one year from the point in time when our partners decide we need to take action to complete our investigation and purchase the technology. It is also common for us to wait a year to investigate a technology and spend three months investigating alternatives.

The process I usually follow:

- I search accounting publications.
- I read articles and case studies to figure out what my peers are doing.
- I visit the websites of the accounting technology products I want to investigate.
- I schedule a product demo and talk to the sales representative.
- I present my recommendation to the partners; they usually go through a demo of the software to experience it, then accept my recommendation.



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
UltraTax
Accounting CS
QuickBooks

5

Doc.It® licenses

WHAT I LIKE ABOUT DOC.IT SUITE

- The flexibility of the software, Doc.It Suite works with multiple programs. For example, we use a variety of programs that generate work papers; they all go into Doc.It.
- Files are stored in an easily accessible PDF file format; there is no reliance on Doc.It Suite or any software program.
- The simplicity of using the program; it is intuitive.
- We are not forced into modules we do not want, we can use any module or all. For example, our first priority was to master the paperless initiative, we then had the flexibility to roll out additional modules like Doc.It Workflow, whenever we want to.
- Doc.It's PDF Editor. I love the calculator and mark-up tools. We already have Adobe, but if you're working in a paperless environment you need easy access to mark-up tools that are similar to what you're using.
- We like the flexibility of adding licenses whenever we need them. For example, we add licenses at the beginning of the year for our seasonal staff, then cut back when those people are not with us.
- Doc.It's pricing was a decision-making factor, we like their pricing.

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

- We started with Doc.It in 2015 and have not generated any new paper client work papers.
- We have not transferred any files into storage this year.
- Office products costs have decreased substantially.
- We have decreased storage cost.
- In two years we will not need paper file cabinets.
- We have experienced time-savings from not having to shuffle paper and when accessing documents. For example, when a client calls their documents are at your fingertips; documents are in front of you at that very moment, anytime a client calls.
- Billings have increased since the adoption of Doc.It Suite, but that is difficult to tie directly to Doc.It.

MY ADVICE FOR MY PEERS IN THE PROFESSION WHO ARE CONSIDERING DOC.IT SUITE

We are 100% pleased with Doc.It Suite and would do it again! The adoption of Doc.It Suite would have been easier if we would have talked to a firm like ours. We would have benefited from seeing the set-up of their folders and templates.

The top reasons we recommend Doc.It:

- It is usable with all your programs.
- Doc.It tech support is superb. For example, if I email them a question, or call in for support my question is answered and the issue is resolved within minutes.
- We have never had any downtime with Doc.It. If we have questions or if there is an issue, it is quick and easy to work with their tech support team and get problems resolved immediately.