

Brown LLP

“I STRONGLY RECOMMEND DOC.IT TO EVERY FIRM”

– Sherry Galesloot, Senior Accounting Technician

OUR IT SOLUTION

I handle our daily IT management needs and outsource IT when needed. We did not need much help from our outsourced IT when we installed Doc.It. Because we added a new server at the same time we installed Doc.It, what might have only taken a few hours to set-up and migrate files required a weekend.

ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT

- We were looking to increase your firm’s productivity.
- We wanted to gain office space by getting rid of the file room.
- We wanted all client information accessible from every computer.

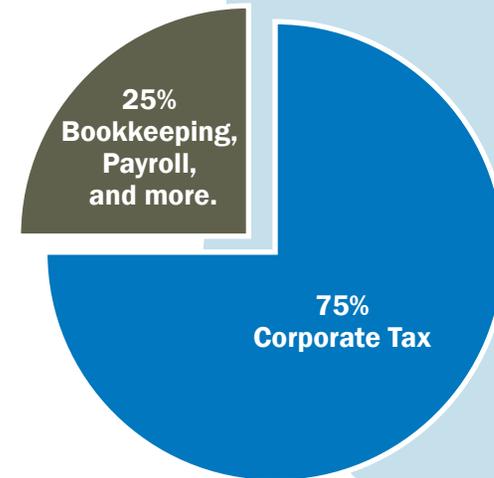
THE PROCESS I FOLLOW THAT RESULTED IN OUR DECISION TO BUY DOC.IT

I handle the task of gathering information on software; I am interested in compatibility and integration, price, features and function. It is common for me to begin my search immediately following tax season. I may make a decision in one- to three-months, this timeline hinges on the partners availability.

With Doc.It, we had talked about going paperless for three years before we started our investigation. In hindsight we put it off way too long; I would never wait that long again. Once we made the decision to go with Doc.It, it happened quickly. It can happen in a matter of a few weeks.

The process I usually follow:

- Search Google.
- Call my peers.
- Visit the accounting technology vendor’s website.
- Demo the software.
- Present the solution to the partners.



Location:
Alberta, Canada

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
TaxPrep
QuickBooks
Sage 50

8

Doc.It® licenses

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WHAT I LIKE ABOUT DOC.IT SUITE

We learned a lot about Doc.It by using it in the firm we worked in prior to starting our firm. When you buy into Doc.It you have to keep an open mind and be prepared to make changes. You cannot do things like you did when you operated with paper or another document management software.

Additional aspects I like about Doc.It:

- I like that Doc.It continues to improve their product.
- Their software is easy to use.
- I like how well it integrates with CaseWare and all our software.
- I love the Doc.It Archive; everything you need is at your fingertips and you have the ability to search quickly.
- The Doc.It PDF Editor is better than Adobe; the tools are better and it is more customizable than Adobe. I love the Text feature, Calculator, Highlighting Tools; everything is better and it is more user-friendly than Adobe.

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

- The biggest improvement is increased productivity with our file prep; we have seen 35% improvement in prep time. Over time we get better with the software and expect prep time to continue to improve.
- The Doc.It Archive is so much more secure than paper.
- We now have no paper files or a file room. When we moved to a new office we realized we would never need a file room, ever.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

I strongly recommend Doc.It to every firm. If you are hoping to improve your system, going from scanner, to PDF Editor to Doc.It Archive is great. I recommend talking to a firm your size that is using Doc.It and find out about their experience. I did this, it was helpful.

THE TOP REASONS WE RECOMMEND DOC.IT SUITE

- Customer service is very good.
- It is easy to use.
- Doc.It continues to improve the product.