

Donald M. Grefe, CPA

“DOC.IT SUITE WORKS! IT WILL DO SO MUCH FOR YOUR FIRM AND HANDLE WORKFLOW AS WELL.”

– Don Grefe, CPA, Owner

OUR IT SOLUTION

We manage IT in-house and engage an IT consultant for about 1-hour per month. Our IT consultant manages our domain and provides off-site back-up.

When we adopted Doc.It Suite we used our IT consultant for about two hours for the initial installation and I spent several hours getting my firm ready for the paperless transition. I expected to spend this time to ensure we had what we needed in place to handle the transition to paperless and for back-ups.

ISSUES THAT FUELED MY DECISION TO INVESTIGATE DOC.IT SUITE

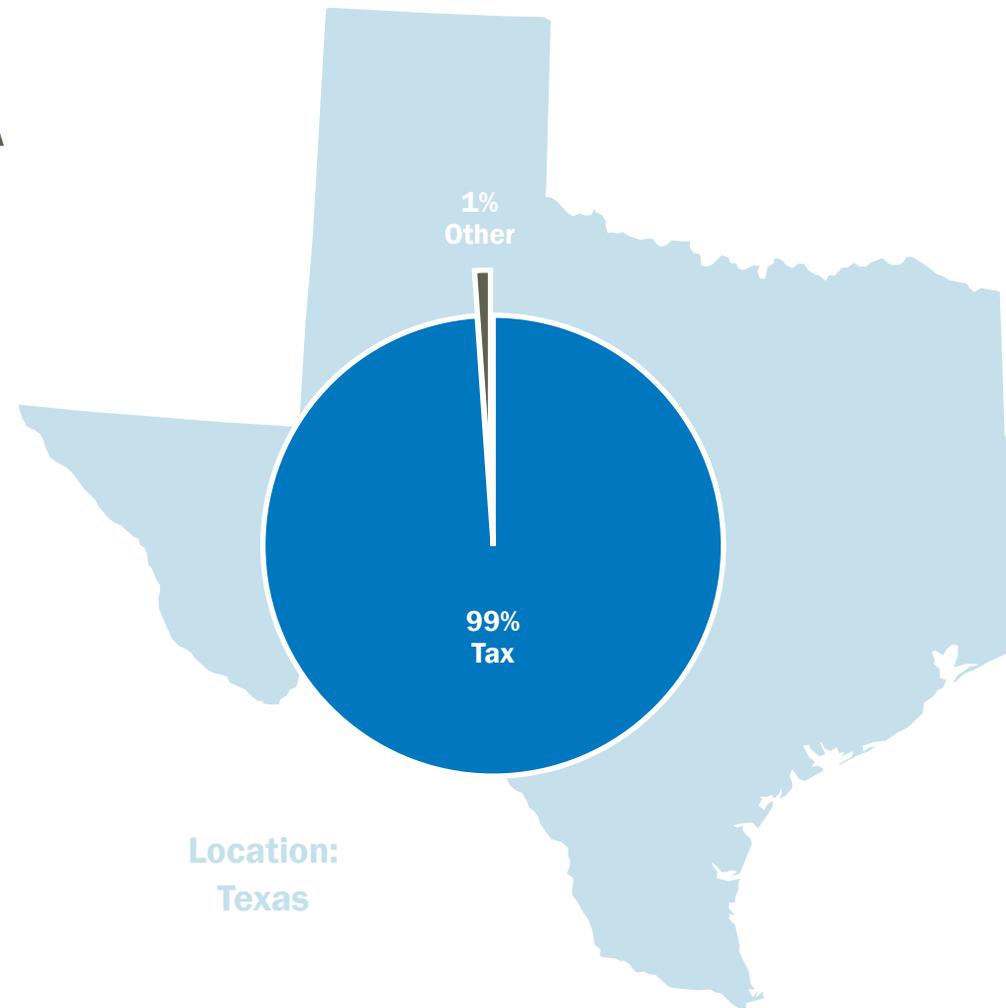
I wanted to become more efficient and paperless. I came to the realization that keeping paper around and storing more paper moving forward was not the way of the future. I wanted to be able to work from a remote location without lugging paper files around.

I was a Lacerte Tax software user and initially considered their document management software (DMS). However, after monitoring the chat group of their DMS users I decided I did not want to use that technology. Instead, I wanted an independent provider like Doc.It that would allow me to get my data out if I wanted to. Doc.It was the solution.

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

I am the only one in my firm involved in accounting technology purchasing decision-making. Deciding on purchasing technology can take years, buying Doc.It Suite was no exception.

I became interested in going paperless back in 2009 and purchased Lacerte DMS when it was first available, but I never installed it. Instead, I started monitoring the user group chat room about the product. Today, as I reflect back



PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
UltraTax CS

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Doc.It® licenses

DONALD M. GREFE, CPA CONTINUED

on this timeline, I wish I had installed a solution earlier but I am thankful I waited; I am absolutely convinced I have a better product with Doc.It Suite.

The process I usually follow:

1. One of the first places I go and rely on for information about accounting technology are my colleagues; peers in the profession.
2. I search accounting websites and search for articles and product reviews.
3. I monitor what my peers are saying in user group chat rooms to learn about their experience.
4. I attend events that provide CPE.
5. I demo the software I am interested in.

WHAT I LIKE ABOUT DOC.IT SUITE

- Doc.It Suite has the files stored in a format I can get my files out if I choose to leave Doc.It Suite. I liked not being “stuck” and having the freedom to leave if Doc.It Suite didn’t work for our firm.
- Doc.It Suite’s built-in PDF Editor is a real plus.

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

I am not hauling files home at night and we have noticeably less paper. For example, I relocated my office a few months ago and nearly every piece of prior year paper we moved was from 2011 and earlier. That paper was sent off to storage and our file shelves today are pretty much empty. I literally have not stored paper files since we started with Doc.It Suite in 2013. Before 2012 returns, we would have had to pull a year of files out of the storage area to make room for the next year’s tax files. I haven’t scanned really old files and probably won’t. If I need to get old paper files, I call my storage facility and they bring it for me the same day for a fee, or the next day at no charge.

ADVICE FOR MY PEERS WHO ARE CONSIDERING DOC.IT SUITE

Doc.It Suite works! It will do so much for your firm and handle workflow as well. Doc.It Suite will allow you to handle work papers as you prefer to handle them. It solves the work paper technique issue.