



A Message from the President

2018 has been a year of 'firsts' for Doc.It, and our entire team appreciates the amazing relationships we have with our clients and partners. Your requests, suggestions and feedback guide everything we do. A few recent highlights:

Doc.It growth in the UK: We expanded Doc.It presence and energy in the UK, with the addition of Simon Fenson to our leadership team. In May Doc.It exhibited at the Accountex UK event – [check out our video, filmed live at Accountex](#).



Doc.It Named a Leader in Accounting Firm Operations Technology (AFOT)

Survey: Our mission at Doc.It is to deliver document management, workflow and portal solutions that help accounting firms improve their level of client service, reduce data security risks, and control costs by consolidating applications. Our focus on the accounting profession allows for customer influenced development and tailored services. So we are particularly proud that accounting firm owners, partners and managers named Doc.It a leader in profitability, risk mitigation, and productivity the 5th Annual AFOT Survey. The annual AFOT survey of accounting firms, conducted by the Insight Research Group, asks respondents to identify software used in their firm that has the greatest impact on these critical business goals. [Check out our infographic](#) on the top issues firms are grappling with.

Focus on Data Security and Secure Client file Sharing: Now is the time to assess your firm's data security and take steps to improve it before the next busy tax season. For accounting firms, documents and data are critical assets. A security failure could result in the loss of clients, loss of reputation, and costly legal ramifications. We have increased our education and outreach efforts to bring firms up to speed on security risks and providing

advice on measures you can take to reduce the risk of data breach or loss. Start your assessment with our [Diagnostic Worksheet: General Practices Risking Data Security](#).

Don Emery spoke at AICPA Engage on "I Exposed My Client!" An archived webinar on the same topic is available on demand: [Reduce Risk, Improve Security](#).

Doc.It also joined our hosting solutions partner [Cetrom](#) in a discussion of firm security. That event is also available for on-demand viewing: [Accounting Firm Data Security Risks and Best Practices](#).

Prepare Now for Next Tax Season: Many firms we work with are taking advantage of the lull before tax season to review their systems and processes, and implementing efficiency-boosting software, whether it's electronic signatures, a secure portal for sharing documents with clients, or rolling out the [Doc.It Go mobile app](#) to support employees on the go.

Respectfully,
[Kevin Murray](#), CPA, CMA
Doc.It President

Industry News and Resources

- [Doc.It Receives K2 Enterprises Prime Award](#)
 - [3 Essentials for Business Transformation](#)
 - [Doc.It Suite Wins Top Awards for Productivity and Risk Mitigation in Accounting Software](#)
 - [Practice Management and Digital Transformation for Accounting Firms](#)
 - [Which Doc.It Product is Right for my Firm? \(Comparison Chart\)](#)
 - [Infographic: AFOT Survey Highlights:Tech Trends and Opportunities for Accounting Firms](#)
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Featured Article

5 Ways CPAs Can Benefit From Mobile Document Management

A boom in mobile enterprise applications is taking place and CPA firms stand to benefit.



If the accountants at your firm could track projects, share documents, and view reports on a mobile device - from home, on vacation, or while commuting - productivity and client service levels would rise. Many firms are adopting mobile document management tools to make this possible. Doc.It was recently awarded a [K2 Quality Award for Best Overall Mobile Strategy](#). Our [Doc.It Go mobile application](#) allows your team to stay on top of projects and documents from any mobile device.

The global mobile workforce is expected to rise to 1.87 billion by 2022, and with the right tools in hand, remote workers can boost productivity and build client loyalty. Arming your staff with mobile document management is increasingly an important business strategy for forward-looking firms.

[Check out Don Emery's article in AccountingWeb](#) on the five key benefits accounting firms can realize through the use of mobile document management.

Upcoming Events

Planning to attend one of these events? [Contact us by email](#) to arrange an onsite meeting.

[Alan Salmon Tech Tour](#)

October 3 – November 3

In its 26th year, the seminar series has travelled across the country to bring you the latest in technology for accountants. Learn the latest about Doc.It in these lively sessions, coming soon to Victoria, New Westminster, Vancouver, Calgary, Edmonton, Winnipeg, London, Toronto, Mississauga, Burlington, Ottawa, Markham, Moncton and Halifax.

Collins Barrow A&A Forum

November 12th, Toronto

67th Annual Kansas / KSCPA Tax Conference

November 16-17, Olathe, Kansas

Doc.It is proud to sponsor this tax update, also including sessions on ethics, big data, and cybersecurity.

[Doc.It Webinar: Optimizing Workflow & Document Management Efficiency](#)

Every 2-3 weeks

Learning Objectives:

- Learn about common issues experienced by other firms.
- Learn how to solve common issues with document management & workflow.
- Learn how document management & workflow software integrates with your firm's existing software (tax, accounting &bookkeeping, time & billing, etc.)

[REGISTER HERE](#)

Doc.It Tips and Tricks

News, helpful tips, and how-to pointers for Doc.It users.

New Portal Features

Enhancements to the Doc.It secure portal are coming soon!

Check out [this 7 minute video of our new portal](#)

For news and upgrade information [email Doc.It with your interest.](#)

Ready to implement eSignature?

Doc-It integrates with Docusign eSignature software,so you can organize documents, procure signatures, and manage it all within Doc.It.

How does it work? [Watch a sneak preview video of eSignature capability in Doc.It](#)

Referral Rewards

Do you know an accounting firm that could benefit from Doc.It's document management and workflow solutions like your firm does? Did you know Doc.It offers a referral reward fee of \$50/user should the firm you recommend select Doc.It? That's an easy \$500 for a 10 person firm. If you know anyone, please help us grow our community and email info@doc-it.com

Like Us, Follow Us, Share Us



Thanks for being our part of the Doc.It community!