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Doc.It

Doc.It eNewsletter

Fall 2019

A Message from the President



Letter from the President

October is Cybersecurity Awareness Month. Experts say it's not a matter of 'if' you'll suffer a data breach, but rather 'when' – it may be inevitable for most of us. Cybersecurity Ventures predicts that there will be a ransomware attack on businesses every 14 seconds by the end of 2019 and every 11 seconds by 2021.

As trusted advisors and keepers of vast amounts of sensitive client data, firms of all sizes can be dealt a devastating blow by a cyberattack, in which the hackers use malware, phishing, social engineering, and related techniques to gain access to protected information. A cyberattack on your firm could lead to a loss of sensitive client information, a disruption to regular business operations, financial losses and damage to a firm's reputation. How to reduce risk?

A few tips for Reducing Cybersecurity risk for your firm:

- Make it a firm policy not to send confidential client data via regular email. Hint: use the Doc.It secure portal.
- Encourage staff members to use strong and unique passwords. Never use the same password for different accounts, and change passwords frequently.
- Invest in a state of the art VPN to secure your network. A VPN encrypts data, rendering it useless to hackers. · If you choose a hosting provider to run core applications, be sure the provider has top notch security.
- Enable two-factor authentication to protect your servers and other storage devices containing sensitive data.
- Keep all software applications up to date, to assure that current security protection is in place.

The Doc.It secure portal, complete with password protected access, secure encrypted email, allows authorized clients and firm staff to view, download, and upload documents and files. The Doc.It portal is included with the Doc.It Suite, and in Doc.It Connect. Read more about the portal in our new Guide to Choosing a Client Portal.

Another great resource to learn about cybersecurity threats and how to avoid them, watch the video recording Accounting Firm Data Security Risks and Best Practices. Doc.It and hosting partner Cetrom offer an educational discussion on the nature of cyber risks, how to be alert for phishing and ransomware activity, and how to monitor network activity to stay safe.

Respectfully,
Kevin Murray, CPA, CMA
Doc.It Inc. President

Product Preview

The Doc.It development team is busy finalizing the version 4.6 release of the Doc.It platform. Advanced bookmarks, document linking, and MS Office plug-ins are among the highlights in the new release. The inspiration for the feature set came from Doc.It users – many of the best ideas come from you!

Doc.It Early Adopter Program

For Version 4.6 and future releases, the Doc.It team is implementing an Early Adopter Program (EAP) to allow

enthusiastic, innovative, and 'super users' to get hands-on with the new release. This allows for early utilization of the new Doc.It features. The software release is then proven by real users and feedback is considered by the development team prior to general release to all clients. Watch for an email announcing details on the Early Adopter Program!

Doc.It in the News

[Doc.It Suite Merits CPA Practice Advisor 5-Star Rating](#)

[Doc.It Portal Recognized in 18th Annual K2 Quality Awards](#)

Industry News and Resources

[Insightful Accountant 'First Look Friday' reviews Doc.It](#)

[2019 Tax Software Survey \(Journal of Accountancy\)](#)

[How to Know Where Critical Data Reside \(CPA Journal\)](#)

[2019 Review of Document Management and Document Storage Systems \(CPA Practice Advisor\)](#)

Featured Articles

Securely Sharing Client Documents: It's Time to Consider a Portal (CPA Practice Advisor)

In order to meet regulatory compliance in the area of data security, including GDPR and other data privacy laws, accounting firms must move away from email and other outdated means of document sharing. Moving to a secure portal designed to support an accounting practice can help firms meet the demands of more technology savvy clients, while improving firm efficiency and productivity.

[Read the article on CPA Practice Advisor](#)

Consolidate Apps to Improve Productivity– by Kevin Sharma

Many firms find that they purchase – and then have to maintain – multiple applications that are redundant or are used by just a few employees. When resourceful employees are free to adopt new applications for their desktops or work groups, they inadvertently increase the burden on IT and drive up costs. Selecting and standardizing on a set of software applications that best suit your firm can enhance productivity and security and reduce operating costs.

[Read the article on LinkedIn](#)

Meet Doc.It - Upcoming Events

Planning to attend one of these events? Contact us by email to arrange an onsite meeting – we would love to meet with you.

[CPAmerica CPAConnect Roundtable](#) – Memphis, October 27

[Western CPE Conference](#) – New Orleans, November 4-8

[Baker Tilly Knowledge Forum](#) – Toronto, November 18

[Live Doc.It Webinars](#)

Get a first look - or a refresher - on Doc.It features for document management, workflow, and web portal. Doc-It demonstrations are offered bi-weekly. Check out the schedule and register today for the demonstration that suits your needs.

We offer live group webinars and access to recorded webinars. Conversely, arrange a live demo with a document management expert who can discuss your specific needs in a private online meeting.

Invite Doc.It to your firm or Association Meeting

What does the future hold for your firm? Your vision may include:

- Attracting and retaining talent
- Reducing the cost, effort of paper and embrace a green philosophy
- Improving security of client communications and documents
- Reducing costs by improving efficiency
- Implementing data retention and compliance policies

At Doc.It, we focus all our time and energy on helping accounting firms leverage smart document management solutions to achieve their goals. Invite us to meet with your firm or CPA association. We can participate in discussions, offer an educational session, or help put together your plan for implementing document management, workflow, or a client-facing portal. [Email Kevin Sharma](#) for details.

Doc.It Resources

Resources, helpful tips, and how-to pointers for Accountants

[New: Glossary of Document Management Terms](#)

The Doc.It team collected a list of the most commonly used terms, and those that our customers most often ask about, to produce this glossary. From Access Management to Workflow, this guide provides explanations, in plain English.

Whether you are just getting started with document management, or need a training reference, this glossary will help your staff understand the important terms you'll encounter in selecting and implementing document management, workflow, or portal. [Download the glossary here.](#)

[Significantly Enhance the Performance of Your Practice When Using CaseWare Software](#)

A number of firms use Doc.It in combination with CaseWare. CaseWare, one of the most popular engagement software applications used by accounting firms, can significantly enhance productivity when integrated with Doc.It document management and workflow software. [Read more here.](#)

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