

# Fulvio & Associates

DOC.IT IS CUSTOMIZABLE, EASY TO LEARN AND TEACH.

## WHAT DROVE YOU TO INVESTIGATE DOC.IT DM & WORKFLOW SOFTWARE?

Before Doc.It, our firm used a well-known document management (DM) system. We sought out Doc.It because we could not customize that system to meet our needs.

## WERE YOU CONSIDERING ANY OTHER DM AND WORKFLOW SOFTWARE?

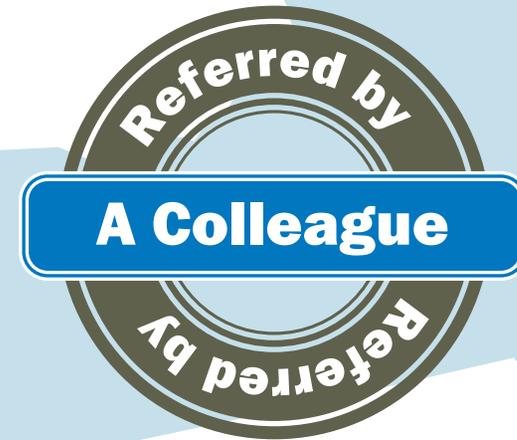
We looked at three additional vendors. Overall, we really like it because it is customizable and not complicated. We chose Doc.It for these reasons:

- 1) Doc.It was customizable; therefore, it could be molded to meet our needs.
- 2) The demonstration provided by Doc.It showed us the software was going to be easy to learn.
- 3) Because it was easy to learn, it would be easy to teach Doc.It to new employees.

## WHAT IMPROVED IN YOUR FIRM AFTER IMPLEMENTING DOC.IT?

We used the first tax and audit season with Doc.It, then further customized the software. After using Doc.It for a year, we understood how to customize it better to meet our needs.

The flexibility to further customize Doc.It post-implementation has made a big difference to our firm. We appreciate being able to modify how we want Doc.It to work in our firm, as opposed to having software get implemented and then getting stuck with something that is not flexible. With Doc.It, we never had to say, "Now we are stuck with it, what are we going to do?" With Doc.It, we are learning as we go along. We further customize Doc.It for our needs when it becomes apparent a change would improve something.



Location: New York, New York

### PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite  
Thomson UltraTax CS  
Thomson Engagement CS  
QuickBooks Pro

# 46

Doc.It® licenses



# Advice to partners or IT professionals considering Doc.It®

## WHAT WAS YOUR BIGGEST CONCERN REGARDING DOC.IT?

With any new software, you are never quite sure if it will be a good fit or how long it will take to implement and learn.

## WHAT WOULD YOU SAY TO A PARTNER OR IT PROFESSIONAL WHO HAS THAT SAME CONCERN?

You are not learning Doc.It; Doc.It is teaching you how to handle a process. Working with Doc.It is not as complicated as it first seems.

## WAS DOC.IT A DIFFICULT CHANGE FOR THE FIRM?

We have a lot of older employees who are not computer savvy. We thought the initial change was going to be difficult; however, we all learned quickly that Doc.It is much easier to handle than the other well-known DM software we had prior to Doc.It.

## WHAT WOULD YOU SAY TO A PARTNER OR IT PROFESSIONAL CONCERNED ABOUT THE CHANGE?

Actually, it is not a big change; it is certainly nowhere near as big of a change as it seems like it might be.

## DID DOC.IT HELP YOU WITH PROCESS IMPROVEMENT?

Doc.It helped with setting up folders and workflow, and storing documents the right way. Files are now easy to look up and find. With Doc.It, we know exactly where all files are.

## WHAT WOULD YOU SAY TO A PARTNER OR IT PROFESSIONAL CONCERNED ABOUT PROCESS IMPROVEMENT?

With Doc.It, you cannot go backwards: Processes will improve.

Our main concern was handling documents we get from clients. Before Doc.It, we might have files scattered through the office. No one knew with certainty where files were at any given time. Today, we notice how easy it is to find the documents we need when doing a return.

## HOW DID THE IMPLEMENTATION PROCESS AND TRAINING GO?

Implementation and training went much easier than expected. The training was especially easy with our older employees.

Doc.It is so much easier to teach employees versus what we were using before. To teach Doc.It, I run a 5-minute course and the staff member is up and running. I teach them more about Doc.It as they go about their work.

## WHAT WOULD YOU SAY TO A PARTNER OR IT PROFESSIONAL CONCERNED ABOUT IMPLEMENTATION AND TRAINING?

Implementation has to get done, so buckle down and do it. We trained one department, then another. Within one week, we had the entire office up and running using Doc.It. Don't procrastinate.

Doc.It trainers are extremely knowledgeable and want to teach as much as they can. With Doc.It, there is a lot to learn, but do not worry: More can easily be learned after the initial training. I have used Doc.It's pre-recorded videos to learn about features and functions. After I teach myself, I am able to teach our staff.

