

Carrie Ware & Company

THE WOW-FACTOR FOR THE CLIENT IS APPARENT

WHAT DROVE YOU TO INVESTIGATE DOC.IT?

The owner who made the decision to go with Doc.It had an advisor who strongly suggested paperless. I have looked at other products since buying the practice; there is nothing that compares to Doc.It.

Our biggest issue is to try and find programs that work well together. Other paperless programs either 1) do not understand the concept of “published”, meaning *finalized unchangeable documents*, or 2) file everything in the same file cabinet, which means they do not get the “archived” part of document management. Doc.It understands both.

WERE YOU CONSIDERING ANY OTHER DM & WORKFLOW SOFTWARE?

We looked at Practice CS and DT Tax. They did not get the archive concept: They did not differentiate between finalized files and work-in-process; therefore, anything in their system would be changeable after-the-fact.

WHAT IMPROVED IN YOUR FIRM AFTER IMPLEMENTING DOC.IT?

You never have to physically search for the paper file: Doc.It ensures everything is at your fingertips. Instead of needing a day or more to go through the labor of delivering a file to a client, with Doc.It you have sent the file to them by the time you got off the phone. The wow-factor for the client is apparent.

We also notice these improvements:

- Financial statements do not get misplaced when you finish the work; they are always where they belong.
- Time on a file has improved.
- Doc.It’s “drag and drop” feature saves so much time. You no longer have to “Save As”; you simply drag the file where you need it and it is done.
- Finding anything using Doc.It is so much easier than it was before we had Doc.It.



Location:
Merritt, British Columbia

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite
CaseWare
Profile Tax
DT Practice

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Doc.It® licenses



Advice to partners or IT professionals considering Doc.It®

WHAT WAS YOUR BIGGEST CONCERN REGARDING DOC.IT?

Backups. We were worried if the system went down or a computer crashed, where the document would go. Additionally, if a document was misfiled, we were concerned about how we would find it. Doc.It's search function solves that completely.

WAS DOC.IT A DIFFICULT CHANGE FOR THE FIRM?

There is a learning curve with Doc.It but, once you figure out the benefits to it, you embrace and run with it. You improve your bottom line with Doc.It. These are the ways Doc.It impacts our firm:

- Doc.It speeds file prep: We have a 20% decrease in time working on a file.
- Admin find files at least twice as fast.
- Huge savings in paper costs.
- Unlimited legible reprints.

DID DOC.IT HELP YOU WITH PROCESS IMPROVEMENT?

Doc.It helped so much. Doc.It held our hand perfectly the entire time. Before training, Doc.It would give us homework that ultimately was helping us set up our system to work according to our process. This homework went so slick and smoothly.

HOW DID THE IMPLEMENTATION PROCESS AND TRAINING GO?

Training and implementation went pretty smooth. Doc.It is there to answer questions and they have free training videos available at anytime. Doc.It also handles questions after-the-fact well too. Doc.It speaks accountants' language: They understand accounting and how accountants work.

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

This is no bigger of an issue than a threat of fire burning your paper. As long as you are doing regular backups and it is stored offsite, you are safe. We back up on a daily basis; therefore, it does not take long to get up and running again.

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

Don't shy away from using Doc.It. It is when you resist the change and don't try it you fail. The more you use it, the easier it gets. You get faster.

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

Think about how many times you need to handle or manipulate a piece of paper. With Doc.It, you can easily file in as many places as you need; you can put it up into the year-end WIP Binder. You do not have to go looking for that piece of paper; it is always where it is supposed to be. You cannot lose the electronic file folder the way you can lose a piece of paper.

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

Doc.It support is fantastic. Don't be concerned: Their staff is extremely professional and they understand accountants' needs. Doc.It understands the importance of lockdown for audit files. Doc.It has all of this already figured it out.

