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Doc.It

Doc.It eNewsletter

Spring 2019

A Message from the President



By all indications, tax season is off to a roaring start. In this edition of Doc.It Talks, you'll find details on industry news and upcoming events – some light reading when you find a short break.

While tax season deadlines are clearly top of mind right now, we encourage you to think about operational improvements you may address in the quieter days once tax season is over. Make a plan to join us for a CPE credited educational webinar, or just call us for a one-on-one chat about your goals. We're here to help.

Respectfully,

Kevin Murray, CPA, CMA

Doc.It President

Industry News and Resources

[Doc.It Earns 5 Star Rating from CPA Practice Advisor](#)

[Practice Management and Digital Transformation for Accounting Firms](#)

[How Scanners Benefit Your Accounting & Bookkeeping Practices](#)

[Time Management: A Critical Element of Firm Success](#)

Featured Article



Document retention: Policies make perfect

If your firm doesn't have a document retention policy, it's something to put high on the list of priorities for the coming year.

Whether starting a new initiative in data retention and compliance, or working to improve your firm's adherence to an existing policy, leveraging a document management system will increase your likelihood of success.

[Check out Chuck Wilson's article on Accounting Today](#) to learn about 3 important ways a document management system can support your retention and compliance efforts.

7 Myths You Shouldn't Believe About Going Digital

In a digital document management system, all content is stored, organized and processed in digital form, allowing fast and accurate search, storage and work processing. But many smaller firms continue to struggle with mostly paper-based systems. Why is there a reluctance to move to a digital model? Having spoken with hundreds of firms over the years, we repeatedly hear these top seven myths and misperceptions about document management systems that keep smaller firms from going digital. Document management expert Cameron Downs is focused on helping smaller firms increase productivity.

[Read his article on AccountingWeb.](#)

Upcoming Events

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

Accountex UK – May 1-2, London

Don't miss Accountex London at Excel on 1-2 May 2019. The Doc.It team will be on hand to discuss productivity solutions for accountancy firms.

2019 Texas CPA Technology Conference – Addison (Dallas)

2019 Texas CPA Technology Conference - Houston

Texas CPA Technology conferences will address spending trends, software licensing issues, leading-edge hardware, mobile and cloud strategies, and security risks. Look for the Doc.It exhibit table at both events.

AICPA Engage – June 9-13, Las Vegas

The industry's largest event for accounting and finance professionals. Doc.It is a proud sponsor and education partner at Engage. [Contact us](#) to arrange an onsite meeting in Las Vegas.

Live Doc.It Webinars

Get a first look or a refresher on Doc.It features for document management, workflow, and web portal. Demo webinars are scheduled every week or so through the summer of 2019. Check out the schedule and register today.

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