document management and document storage solutions. I don't think it is worth dwelling on this too much because the distinction will become apparent as you dig deeper into the different solutions in both categories. At the end of the day, it really comes down to an issue of scope of functionality.

John Higgins • Sep. 05, 2014

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In last month's issue, we provided the 2011 edition of the document <u>management</u>

business. And they often have enough configuration features that allow them to be deployed in many types of organizations. The exceptions are the "CPA centric" solutions that are clearly designed to be integrated with a suite of tax and accounting software applications. The document storage systems are more likely to be narrower in their scope of features and functions. And as in the group reviewed here, they are often focused on their direct integration with a particular tax preparation system. But there are exceptions so please read each product review and evaluate the individual solutions on their own merits.

The most important point I would like you to take away from these reviews is that you should be investigating solutions from both categories. This will help you to become a more educated buyer, and you will develop a much better understanding of the range of features available in different solutions. This will enable you to make the best selection to fit your needs.

The ratings system for this review fine tunes the evaluation criteria to focus on the features that you will leverage the most as you integrate the document storage software into your workflows. The ratings are organized into the following three categories: core product features/functions, integration and advanced functionality.

Core Product Functions/Features – First and foremost, we review the system's interface to assess its intuitiveness and ease of use. In addition, we determine if there is a print driver available that allows you to publish documents from any application into the system. Flexibility in setting up your folder organization model is addressed, as well. The other important attribute here is the capability to search and retrieve documents quickly.

Integration – One of the keys to successful deployment of a document storage system is your ability to integrate it into your workflows as seamlessly as possible. In order to achieve this, you need a system that integrates with your core software

applications as much as possible. In this category, we evaluate integration with tax

limitations and an executive summary of the application. If you visit us online at www.CPAPracticeAdvisor.com/10281536, you will find a comprehensive review of each product that supports the ratings provided here.

Technology

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