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documents and information with clients and client employees.

Mary Girsch-Bock • Oct. 20, 2017



AccountantsWorld Client Portals

www.accountantsworld.com

From the **2017 reviews of Accounting Firm Portals.**

AccountantsWorld solutions provide a number of portals that make it easy to share documents and information with clients and client employees.

Employee Portals, available through the Payroll Relief application, allow clients to provide their employees with self-service access to payroll and tax-related information. For firms offering Employee Portal access to payroll clients, each secure portal lets employees access the portal to obtain payroll data such as paystubs or W2s, and review and update personal information such as a home address or email address. Employee portals can be custom branded with the client logo.

The Cloud Cabinet document portal offers document management and storage functionality. Close integration with other AccountantsWorld products provides seamless archiving of accounting, payroll, and compliance records and reports. Cloud Cabinet can also be used as a stand-alone document management/portal

application, providing secure archiving, file storage, and document management

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Cabinet. The utility replicates the Cloud Cabinet folder structure on the PC. Users simply drag and drop documents directly into a folder, and the utility automatically and effortlessly uploads the document to Cloud Cabinet behind the scenes.

Cloud Cabinet simplifies document sharing with clients at any time. There are no size restrictions for files, so users can upload files of any size. The product currently offers 5GB of storage, with users able to purchase additional storage if desired. The portals allow both firms and clients to easily upload, download, and send documents. Firms simply enable access and provide clients with a username, and, for additional security, clients set their own passwords. Permission levels are maintained by the firm at the folder level, with firms determining the level of access that each client has, and the folders each client can access. Clients see only their own folders and a Shared folder for documents and information firms share with all of their clients at once.

For even greater convenience and flexibility, documents can be sent from Cloud Cabinet to any email address, even to recipients without access to Cloud Cabinet. Firms can also opt to send email notifications to clients when files are uploaded to Cloud Cabinet, or in turn, receive email notifications when clients upload files to the application.

Cloud Cabinet integrates with the other modules available from AccountantsWorld, and archiving capabilities are offered in Accounting Power, After-the-Fact Payroll, and Payroll Relief. Reports and documents created in these applications can be automatically archived to Cloud Cabinet, making it easy to collaborate and share information with clients. To make it easier to archive, access, and share documents, firms can launch Cloud Cabinet from within applications to upload or download stored documents or send stored documents to clients or other staff members. Even firms that do not subscribe to Cloud Cabinet can use a limited set of features from within applications, to access client documents and upload images, documents, and

reports to a client's folders, download stored files, and send documents to any email

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designed to help accountants grow and expand their practices.

For those already using AccountantsWorld, or wishing to use the product as a stand-alone document management and portal solution, Cloud Cabinet can be purchased for \$595.00 per year for expanded document management features. Pricing for AccountantsWorld Power Practice System is \$2,195.00 annually, or users can pay \$220.00 per month, and includes Accounting Power, Cloud Cabinet, Website Relief, Practice Relief, and After-the-Fact Payroll. Payroll Relief is priced separately with a first-year, all-inclusive \$1,495.00 price, and affordable per-paycheck or per-payroll pricing options afterward.

2017 Rating – 4.5 Stars

Firm Management

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