CPA
Practice Advisor

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Document Storage Programs

FileCabinet CS has been a perennial favorite in my review of document storage solutions. It is one of the most widely used systems in small and midsize accounting and tax practices. The product has enough depth of functionality to make it a viable stand-alone document storage solution, but it excels in its integration with the other CS Professional Suite applications.

Usability — 5 Stars

The maturity of FileCabinet CS is revealed in the visually intuitive design of the user interface. Your entry point to the system is a list of the clients displayed along the left side of the screen and a series of windows that displays system-level information such as recent activity in the program, an audit trail of updates installed and a list of open tasks. The interface will be particularly familiar for users of other CS Professional Suite applications.

Document Organization — 5 Stars

The documents and files are organized by client, which can be imported from other CS applications or created from within FileCabinet CS. Each client's "file cabinet" is organized by application folder (such as tax, accounting, etc.) as well as any custom folders you create. Within each of these, the sub-folders are organized according to accounting periods that you associate with the application. For example, the tax folders will be yearly, while the accounting folders may be set up by quarter or month. You have an option to toggle the listing to make the year the primary folder list, and the applications become the sub-folders. You can establish recurring folders that will be created automatically from year to year.

Integration — 5 Stars

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appealing feature is to send a set of individual files as a single merged PDF.
If you choose the cover sheet option, an HTML link to the first page of each merged file is generated. This is a great way to package a set of client reports that are generated from multiple applications.

Annotation– 5 Stars
FileCabinet CS includes a proprietary viewer for the static document images that allows you to apply various annotations including highlighting, redaction, notes, electronic stamps and even audio clips.

Overall Value — 5 Stars
The depth of functionality provided in FileCabinet CS makes it a formidable competitor in the document management category that we reviewed in the June/July 2008 issue (www.CPATechAdvisor.com/go/1966).
If you are a using other CS Professional Suite applications, this is a natural choice. Pricing is $1,500 for a single user. The first four-user network license is an additional $500, and each additional four-pack user license is $250. An optional web-hosted version is available with the Virtual Office CS offering. The company offers web-based and live on-site training services.

2008 Overall Rating: 5 Stars

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