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*the Sept. 2008 Feature on [Scan/Fill/Populate Systems](#)*

GoFileRoom ES is a secure, web-based document management system offered as part of the Thomson Reuters Enterprise Suite family of high-end, professional accounting and tax compliance programs or as part of the CS Professional Suite, which is geared toward smaller and mid-sized practices. Both suites offer a variety of applications for professional accounting firms, ranging from tax and write-up to practice management and planning. While the features and capabilities of the ES and CS flavors are exactly the same, the two offerings differ in integration and pricing.

GoFileRoom ES offers extensive document management and workflow features, organizing documents in an index-based structure that enables thorough search and query functions, as well as offering full linking of source documents to and from client returns. Through the program's FirmFlow module, users can manage all aspects of client engagements, with management of all scanned documents, files, notes, checklists and firm-specific routing slips or other items. With the addition of the TaxSort module about two years ago, GoFileRoom ES also offers advanced organization functions, with the web-based system processing scanned 1040 source documents, identifying what each document is, and producing a bookmarked PDF file that organizes the documents into the correct tax preparation order, along with a summary cover sheet of extracted client data.

Since the core features of this module rely upon recognition of forms for which there can be numerous variations, the program is specifically designed to learn

from previous use. That is, the first time a user at a firm scans in a particular

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all sources. The system integrates directly with the GoSystem Tax ES compliance package, but it does not currently offer an automatic client return population feature. Frank Swierz, a Senior Director of Software Development for Thomson Reuters, noted that they are exploring development of such a system, as well as considering partnering with third-party developers for integration with their auto populate capabilities.

There is no separate module fee; per-return pricing for TaxSort starts at \$1 per tax return, and the per-return price decreases as volume increases.

**Forms Supported for Automatic Population:** None at this time, although Thomson Reuters is considering development of an automatic population feature in the future (see above). On the CS side, the FileCabinet CS solution does offer a population module with integration into UltraTax CS.

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