

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Document Automation

The GoFileRoom system from Thomson Reuters is geared toward advanced document management for tax and accounting firms, but also provides excellent automated workpaper compilation features, client portals and other optional modules.

As a secure web-based system, GoFileRoom takes advantage of powerful servers on the back-end, to provide fast processes and workflow management functions via FirmFlow, including the ability to use the Tax Sort module to automatically identify documents, organize them in appropriate return review order and produce paperless PDF workpapers that include bookmarked and linked entries for quickly moving between documents.

The system can recognize almost all 1040 source documents and, while it does not directly integrate with tax systems for automatic return or client data organizer population, the electronic workpapers it produces offer a summary sheet that eases data entry and review functions for any level of staff. GoFileRoom's document management features directly integrate with other programs in Thomson Reuters' CS Professional Suite and the Enterprise Suite.

Another advantage of the hosted program is that users indirectly help each other because as the system identifies new types of documents, it remembers the form layout and identification for all future users who scan a similar form. In addition, GoFileRoom offers scanning and populate capabilities with Copanion's GruntWorx and SurePrep's 1040SCAN.

Forms Identified: All common 1040 client source documents.

Organized PDF Workpaper Compilation: Yes

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us