(800) 621-6501

www.CabinetPaperless.com

From the May 2013 review of Document Management systems.

Best Firm Fit

- Firms who want a product which can be accessed through a web browser or a client application and can be hosted in the cloud or using an on-premises server.

- Companies who need a document management system within the desktop version of QuickBooks.

Strengths

- The product is a very structured, and is relatively easy to use, and has features like drag and drop between the software and Windows Explorer.

- Direct QuickBooks integration and indirect integration into popular accounting applications, including QuickBooks, Sage 100, and Microsoft Dynamics GP.

- Options for on-premises or cloud hosting, and clients can use a browser or a client application.

- Product has a software development kit for custom integrations with other applications.

- Workflow capabilities allow automated routing of documents.

Potential Limitations

- Specific integrations are not available for most popular accounting firm

still used and sold to clients by many accounting firms and value added resellers.

Documents are stored in a hierarchy which includes repositories, cabinets, folders, and tabs. Access permissions can be set at the repository, cabinet, folder, and individual file level.

The product is very structured, which makes the product easy for end users to learn and use, but also makes it more difficult to characterize items which could be classified into two or more categories. This high level of structure also makes it very important that the configuration is done thoughtfully and completely so users can properly classify documents for future retrieval. Retention periods are set according to where the document is placed in the structure, so poorly thought out installations can create problems in the future.

Users can access Cabinet data through a full-featured client application, a more limited web interface, or using the Company's optional iPad app. Cabinet also has a small in-memory app called Cabinet SuperSearch, which allows users to search by keywords within folders, document names, and full text for supported file formats. Once a search is executed, users can enter additional search criteria to filter the results further.

Cabinet has a reseller program, and some accounting firms sell and install the Cabinet SAFE DMS to third parties as part of a technology consulting practice. The application uses Microsoft's SQL server database and ASP.NET technologies, and its user interface uses design layouts which give it an appearance similar to Microsoft applications like Outlook 2010.

Summary & Pricing

Cabinet SAFE CLOUD is $70 per month per concurrent user (or $50 per month per named user), with a one-time setup charge averaging $750. SAFE CLOUD provides

5GB of shared base storage per user, with additional storage available for $5 per GB

Cabinet SAFE CLOUD	
Core Product Functions/Features	4.25
Document Workflow	4.0
Document Control	4.75
Special Features	4.5
Overall Rating	4.5

Firm Management • Technology

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