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with the Thomson Reuters CS Professional Suite of applications for professional accounting firms.

Brian Tankersley • Aug. 08, 2014

Overview

FileCabinet CS by Thomson Reuters is the document storage application associated with the Thomson Reuters CS Professional Suite of applications for professional accounting firms. The base version application is targeted at smaller firms, however, a version of the application which uses full Microsoft SQL Server (2008 or higher) is available and recommended for firms with 15 or more users.

Documents can be stored either in the native, editable format (e.g. Word or Excel), converted to a static PDF file, or both, depending on the firm's preferences. The product is mature with an excellent feature set compared to other products in the document storage solution segment.

FileCabinet CS is organized around the concept of a filing cabinet with a folder for each client where all related information is stored. Firms can have multiple data cabinets for storing different types of documents which are housed in separate locations. Templates can be used to create client data folders at the time a new client is set up, or in batch for multiple clients from within certain applications.

Documents can be published to data folders for all past years, the current year, and up to two years into the future. Files can be dragged and dropped from Windows Explorer or Microsoft Outlook directly into a client's folder.

A Windows print driver is included with the application, as well as add-ins which provide integration with Microsoft Office applications such as Word, Excel, and Outlook. Tools also exist within the application for annotating and commenting on

documents with highlighting, tick marks, notes, and multimedia clips. A direct

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integration into many of these applications. Key CS Professional Suite applications include UltraTax CS, NetClient CS portals, Workpapers CS and Accounting CS. An example of this integration is the option for automatic posting of invoices by Practice CS to a client's portal as well as a FileCabinet CS drawer and folder. Data from many, but not all, of the other CS Professional Suite applications can be configured to back up to FileCabinet CS automatically.

Summary

FileCabinet CS has a number of exclusive integrations with the Thomson Reuters CS Professional Suite of products, and should be considered by firms who use many of these tools. The product is mature and has a good feature set, and provides firms with a digital filing cabinet for their client data files. FileCabinet has add-in tools for Word, Excel, Outlook, and Adobe Acrobat, and it can be used by clients with NetClient CS client portals and the client-facing NetClient CS Mobile app to automatically capture, upload, and file documents with the mobile device camera.

Best Firm Fit

FileCabinet CS from Thomson Reuters is part of the Thomson Reuters CS Professional Suite of applications for accounting practitioners, and should be considered by firms using other CS Professional Suite applications.

Strengths

- Good integration with other components of the Thomson Reuters CS Professional Suite of professional accounting applications, including automatic batch publishing of data into client folders.
- Many CS Professional Suite applications can make backups of their data to a client's file in FileCabinet CS.

- Includes check-in and check-out, which is normally a feature of a full document

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- Integrated PDF editing requires the use of Adobe Acrobat (Standard or Pro, version 9 or higher). Other PDF editors are not supported.
- Unlike some other solutions in this segment, FileCabinet CS does not have integrations with products outside their suite of solutions, so while the product integrates with Microsoft Office, it may have a less integrated workflow when working with other third party applications.

Pricing

FileCabinet CS licensing starts at \$940, and pricing for an eight user firm would be approximately \$1,500 for the first year and \$700 for maintenance and support in subsequent years. Training, consulting, and implementation services are priced separately. Thomson Reuters offers a number of ways to obtain FileCabinet CS, including hosting through Virtual Office CS, a “pay as you go” arrangement similar to leasing or renting software through their SaaS for CS Professional Suite offering, or a traditional up-front purchase. The publisher offers some discounts off of the full suggested retail through application bundles and volume licensing.

2014 Overall Rating: 4.75 Stars

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