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FileCabinet CS is one of two powerful DMS solutions available from Thomson Reuters, targeted specifically to the tax and accounting marketplace. The greatest value of FileCabinet CS is derived from its deep integration with the other solutions that make up the CS Professional Suite for the tax and accounting profession.

Core Product Features & Functions

The FileCabinet CS interface includes a navigation panel that lists clients along the left side of the screen and a combination of panels that display tasks you can perform within the program along with a list of document activity. This allows you to easily retrieve documents within which you were recently working.

Recent enhancements include the ability to create a new client repository “on-the-fly” as you are processing documents and the ability to add client-specific subfolders for customizing the storage of documents not generated by the integrated CS applications. The FileCabinet CS print driver publishes output from the CS applications and any other software directly into the proper client folder. 4.75

Integration

The email integration is very strong in that you have a lot of control over setting up a document for email distribution, including converting to PDF format, combining multiple documents into a single PDF, an optional banner page, password protection and customized email signatures. Workflow functionality is linked to their Practice CS application's project management feature, the status system built into UltraTax CS, and the tax engagement workflow features of Engagement CS for business tax returns. As previously noted, all products included in the CS Suite are deeply integrated with one another. Additionally, FileCabinet CS offers the Source Document Processing service for automated organizing and labeling of source

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The NetClient CS portal application provides direct integration with FileCabinet CS to post documents for client access, exchange documents and files with clients, and many other features. In addition to providing document presentation on the portal, direct access to other CS applications can be provided to clients, such as the vendor's Client Bookkeeping Solution. 4.5

System Management

Document security can be set at the folder level, as well as by users or groups that you choose to establish. A document event history log provides you with an audit trail of revisions to a document. The system manages a check-out/check-in process for exclusive document editing. 4.5

Summary & Pricing

FileCabinet CS is clearly the optimal choice for your document management system if your practice is centered on the CS Professional Suite of applications. Virtual Office CS or SaaS for CS Professional Suite hosted solution are compelling options for firms that want to outsource the challenges of managing and securing an internal network infrastructure. Pricing for FileCabinet CS is \$1,500 for the initial first-year license, plus \$500 for the first bundle of four network users and \$250 for an additional set of four users. The NetClient CS portal solution is an additional cost.

2010 Overall Rating 4.75

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