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premise application (Cabinet 371 L), and as a mobile app, that is compatible with both iOS ...

Mary Girsch-Bock • Aug. 18, 2016



From the **2016 reviews of Document Management and Document Storage systems.**

Best Fit: This enterprise level document management product is best suited for larger accounting firms, and is also well suited for legal, manufacturing, healthcare, and HR industries.

Product Strengths:

- Product is scalable, with firms able to choose from three product levels
- Product integrates with a variety of third party applications as well as Microsoft Office and QuickBooks
- Product offers a variety of system add on options to increase functionality
- Workflow capability is included in the product (Gold and Enterprise)

Potential Weaknesses:

- Users will likely require significant training

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both iOS and Android devices.

Though originally designed for accounting firms, Cabinet SAFE Cloud now markets itself to other industries including healthcare, insurance, HR, manufacturing, and legal. The Cabinet SAFE Cloud dashboard provides users with access to the product repository, where all cabinets are stored. Each cabinet contains a series of folders, where all documents are ultimately stored and managed. The dashboard also offers access to previously viewed cabinets, workflow counts and any bookmarks that have been created. A drop-down menu at the top offers access to standard system functions as well as quick access to the Cabinet SHARE feature.

Adding documents is easy, with users able to scan a single document, multiple documents, use the drag-and-drop feature to add documents from any desktop system, or print directly to the Cabinet SAFE application from any application. Emails and attachments can also be imported directly into the product from Outlook if desired.

Using Cabinet SAFE Cloud, users can access documents from anywhere with an Internet connection, and all transmissions are encrypted to keep documents secure.

Advanced Management and Archiving Features 4.75 Stars

Users can easily search documents using a variety of filters including Creator, Keyword, Creation Date, Title, and Modified Date, along with a host of other filters. The product also offers extensive search capability, with users able to search using text within the document. Because of the complex nature of the product, initial system configuration is typically handled by Cabinet support staff to ensure that the product is set up properly to suit the organizational structure of the firm.

The product offers excellent workflow capability, so users can easily route important

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Client Collaboration Tools 4.5 Stars

Cabinet SHARE is an optional module that is designed to allow firms to share documents with both Cabinet SAFE users, and those not using the product. Users must create the SHARE address book prior to sharing documents with non-SHARE users. Once an address is entered, users can upload files to a specified SHARE folder, where clients and other end-users can access them.

Integration 4.75 Stars

Cabinet SAFE integrates with a variety of third party applications including CCH Practice Management, Microsoft Dynamics, Oracle ERP, QuickBooks, Sage 50, Sage 100, Salesforce, and many others. The product also has an open API that provides developers full access to integrate any third-party application with Cabinet SAFE. Other integration tools include Cabinet Synchronizer, which allows users to integrate content from any software product, Cabinet Retriever, which allows users to access SAFE documents from other third-party applications, and Cabinet Books, which offers streamlined data entry into either QuickBooks or QuickBooks Enterprise products. Cabinet WEB is a browser based content management system, which allows users to view all documents remotely.

Cabinet SAFE allows users to store a variety of file formats, including Word, Excel, emails, photos, faxes, and PDF's, with all documents stored in their original file format. Cabinet also offers accountants and CPA's a Value Added Reseller program that provides accountants with the opportunity to offer a variety of services to their clients, including direct sales, installation, and product support. .

Support/Help 4.75 Stars

Cabinet SAFE offers a variety of useful tools for users, including access to a comprehensive user's guide that can be viewed or downloaded. A variety of videos

are also easily accessible from the vendor’s website, and users can also catch some

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The Gold level is \$49 per user per month, and also includes the SHARE portal and Workflow functions. The Enterprise level pricing is available upon request, and offers advanced functions such as AP automation and accounting software integration, and well as a QuickBooks module. Initial setup fees, system implementation and training fees are all priced separately.

2016 Rating – 4.75 Stars

Firm Management • Technology

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