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designed for professional accounting firms. Thomson Reuters offers three licensing options; On-Premise, Virtual Office, and SaaS, so users can choose the deployment method ...

Mary Girsch-Bock • Aug. 24, 2016



THOMSON REUTERS

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Potential Limitations:

- The product offers little incentive to firms not using other Thomson Reuters CS applications

Thomson Reuters

www.csthomasonreuters.com

800-968-8900

Basic System Functions 5 Stars

FileCabinet CS is part of Thomson Reuters CS Professional Suite of applications designed for professional accounting firms. Thomson Reuters offers three licensing options; On-Premise, Virtual Office, and SaaS, so users can choose the deployment method that best suits their firm needs. FileCabinet CS is easily navigated, particularly for those used to other CS applications. The product uses a simple folder structure to store documents, with users able to choose the folder from the List of Drawers. Firms can easily create multiple filing cabinets, where they can easily store and manage different types of documents.

Along with client folders, those using other CS applications can easily access any folders stored in their related applications as well. Once a particular document is chosen, users can view the document on screen, with an event history related to that particular document displayed on screen as well.

Core Document Storage Functions 5 Stars

FileCabinet CS contains templates that users can utilize when setting up new clients and creating new data folders. For firms handling multiple documents for multiple

clients, they can opt to use the batch system to process multiple documents

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the product using TWAIN compliant scanners. A Windows print driver is also included in FileCabinet CS, so users can easily print documents directly into folders. Most CS applications also contain this feature, so any document processed can simply be printed directly and stored in FileCabinet CS.

Documents can be stored in their native format such as .Doc, .XLS, or .PPT, or users can convert the document to a PDF file. Annotation tools allow firms to easily annotate documents or black out sensitive information prior to releasing the document to a third party. Text additions and signatures can also be added to any document stored in FileCabinet CS. Users can easily label each page as it is stored in FileCabinet CS, and security options can be set for folders or groups of folders to maintain security and confidentiality.

Client Collaboration Tools 5 Stars

FileCabinet offers complete integration with Microsoft Outlook, allowing firms to easily process client emails. Users can simply click on the email icon, choose the documents that need to be emailed, enter the recipient name, and send. Prior to the Send process, users can also choose whether to annotate documents, combine multiple documents into one PDF file, or password protect the file. All documents are securely encrypted during transit for additional protection.

FileCabinet CS can be used with NetClient CS to offer clients a secure portal where financial statements, tax returns, invoices, and other sensitive documents can be shared. Firms can determine which clients have portal access, and assign them a user name and password that they can use to access documents. Once a document is uploaded by a firm, an email is sent to the client notifying them that a file is available to be downloaded. Once a client is logged into the portal, they can easily download the documents at their convenience, as well as upload any documents into the portal

for the firm to later access. All documents are in a PDF read-only format, so no

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The Help and How-To Center offers access to various user tools including a search function to look up various issues, to user bulletins and troubleshooting suggestions. Support videos are available to view, and users can easily download product updates from the support center as well. Product support is available via telephone during regular business hours, as well as via email and fax. A live chat, also available during business hours, is available as well.

Summary & Pricing

Current Thomson Reuters CS Professional Suite of application users will garner the most benefit from using FileCabinet CS. Various licensing models are available including On-Premise, Virtual Office CS, with the product hosted by Thomson Reuters, and SaaS deployment, with the product leased and hosted by Thomson Reuters. Pricing for FileCabinet CS starts at \$1,900, with portals available through NetClient CS at an additional cost. Thomson Reuters also offers volume licensing and bundling discounts.

2016 Overall Rating 5 Stars

Firm Management • Technology

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