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eFileCabinet — eFileCabinet

877-574-5505 www.efilecabinet.com

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From the August 2008 [Review of Document Storage Programs](#)

eFileCabinet was established by James Blaylock, CPA back in 2001. Therefore, with this product, you have leadership from someone who understands the accounting

and tax business. eFileCabinet is designed to provide an easy-to-use method of organizing your files for quick and easy retrieval by emulating a physical file cabinet. The current version 3.5 is due to be upgraded to 4.0 for a release in the third quarter of 2008.

Usability – 4.5 Stars

The system has an intuitive, easy-to-use interface. The entry point begins by selecting the file cabinet you want to access, i.e. client files, firm administration, etc. Each file cabinet can have its own password for access control. The system includes an “eFile” print drive that allows you to print any report or document to PDF format and file it directly into eFileCabinet.

Scanning software is included that lets you interface with any TWAIN-compliant scanner. You will be able to preview each of the scanned pages before they get filed. You will also be prompted to select the drawer and folder in which you want to store the file. OCR functionality will be added to version

Document Organization – 5 Stars

The system uses the typical cabinet/drawer/folder model. You begin by searching for clients with a partial entry of the client name. Within each folder, you will be prompted to choose from a list of suggested file names, i.e., tax return, IRS letter, etc. This list is created for each folder, and the user always has the option to create a unique document name. A “check-in/check-out” feature is included to control against multiple people trying to edit documents simultaneously.

Integration – 4 Stars

Since eFileCabinet does not have a tax or accounting software product, no direct integration is offered with these applications. However, integration is available with MS Office via an eFileCabinet button in the toolbar; this applies to Word, Excel and Outlook specifically. When you save an Outlook message, the subject line will be inserted as the default file name for the message. The e-mail is stored in an *.MSG file format so that it can be opened as a dynamic message, and you can view the attachments, as well.

Annotation – 4 Stars

eFileCabinet includes a PDF viewer so you can preview PDF files when you highlight them in the document hit list. Files are stored in their native format; therefore, all annotations are handled at the application level with Adobe Acrobat, Excel, etc.

Overall Value – 4.5 Stars

eFileCabinet offers an effective, low-cost solution that allows you to do a better job of organizing your client files (and other file types, for that matter). The software is priced at \$1,700 for a 5-user license. This includes assistance with installation and conversion to get your files established. Recently, eFileCabinet unveiled a value-added service to the eFileCabinet product in the form of online backup. Concentrus Online Backup (www.concentrus.com) allows users to store their valuable documents in an off-site location so that in the event of system failure or natural disaster, files are still retrievable. Home, Small Business and Enterprise plans are available.

2008 Overall Rating: 4.5 Stars

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