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John Higgins • Jun. 01, 2009

From the June 2009 Issue

Just like the white snow melting into green grass, our perennial review of document storage and document management solutions has become a key milestone in the transition from winter to spring and summer. What a great time of year! This also means we have completed yet another year of development efforts by the vendor community. The solutions they develop to help you take your accounting and tax practice “digital,” have become even more effective. So our mission in this review and the companion review of document management systems to be featured in the *The CPA Technology Advisor* in July, is to help you gain a better perspective of what many of the leading vendors have to offer and some of the enhancements they have made while you were busy laboring through another productive tax season.

In these reviews we continue to face the challenge of trying to appropriately categorize the solutions into comparable groups. That is much easier said than done because there are so many good solutions and the depth and breadth of functionality varies considerably. However, we have made our best attempt to provide meaningful comparisons by separating the reviews between document “storage” systems and document “management” systems. I’ll be the first to admit that the line that separates them is much grayer than it is black and white. So we’ll start by attempting to explain the differences between the two categories.

When we talk about document storage systems, think of these as software

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Document Management systems not only organize the storage of electronic documents and files; they also provide extended functionality to integrate with tax and accounting applications, and perhaps provide a portal component, workflow automation, document retention and more. We'll provide an in-depth discussion of the features and functions of these systems next month. For now, our focus is on the more simplistic document storage tools.

Since these document storage systems tend to differ considerably in the nature of their functionality, we have rated them on four relatively broad attributes: user interface, file organization/management, integration with other software applications, and overall value based on the depth of functionality and pricing. We have almost a dozen products in this review, so let's get started.

[AccountantsWorld – CyberCabinet](#)

AccountantsWorld provides an extended suite of web-based applications targeted towards the sole practitioner and small firms to provide their clients with comprehensive tax, payroll and accounting services, all delivered via the web.

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Review](#)

[CCH Small Firm Services – ATX/TaxWise Scan&Fill](#)

This application is designed primarily for tax practices that are using either the ATX or TaxWise tax preparation products. Either

of these products will integrate directly into the Scan&Fill product

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tax returns and store them. However, you also have the ability to set up a folder structure to store any other files.

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eFileCabinet, Inc. – eFileCabinet

This solution is what we would classify as a horizontal document storage system. This means that it is designed to work in any type of business, not just tax and accounting firms. However, due to the fact that the founder who originally designed eFileCabinet is a CPA, accounting firms continue to be its primary market.

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Intuit – Lacerte DMS & ProSeries DMS

We'll kill two birds with one stone on this review. The Lacerte DMS and Pro-Series DMS products are variations of the same DMS platform designed by Intuit for the Lacerte and ProSeries tax software packages respectively.

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Office Tools Professional

Office Tools Pro is in a class of its own because of the nature of the integrated suite of applications that are bundled into one complete package. In addition to basic document storage capability,

OTP provides the following applications: contact manager, calendar, project

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systems is not black and white.

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ShareFile – ShareFile for Accountants

SIDEBAR: ShareFile is essentially a file sharing portal more so than a document storage application. Its core purpose is to provide a secure online storage for files that are exchanged with clients and others. My point being is that ShareFile is more likely to be used as an extension of your primary file storage/management.

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SmartVault Corporation – SmartVault

This is a niche solution designed specifically as a companion product for QuickBooks. This is an online solution that integrates with your locally installed QuickBooks software. The company just recently announced the release of a client bookkeeping solution aimed specifically at accounting professionals who provide client bookkeeping services.

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Speedy Scan Company Inc. – Speedy Organizer

This is probably the simplest of all the solutions reviewed in this article. Speedy Organizer is designed as a simple tool to organize scanned images. The essential role of the product is to provide an interface to assign index values to scanned documents to expedite search and retrieval.

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