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Document Automation

FileCabinet CS is a document management solution primarily designed for integration with the Thomson Reuters CS Professional Suite. In addition to document storage and management features that include paperless management, integration with accounting and tax programs, management tools and reporting functions, FileCabinet CS also offers an additional service called Source Document Processing that provides automated form identification and data extraction capabilities.

Source Document Processing includes OCR processing functions that allow users to scan client source materials and transmit them to the secure Thomson Reuters data center, where the documents are turned into PDF files and labeled and grouped by form type. The system also extracts client data and presents it in a review format that lets users verify the accuracy of information and then transfer the data into a client's 1040 in UltraTax CS. Source Document Processing costs \$12.50 per client return, regardless of the number of forms scanned and organized by the system.

FileCabinet CS also provides good storage and management functions, and its integration with the other programs in the CS Professional Suite can give a significant productivity boost to many firms.

Forms Identified: W-2, W-2G, 1099-INT, 1099-DIV, 1098, 1099-R, 1099-MISC, 1099-G, 1099-B, 1099-Q, 1099-C, 1099-LTC, SSA-1099, RRB-1099, 1098-E, 1098-T, and 2439

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