800-621-6501

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Strengths

- Optional web hosting delivery model
- Extended set of integration utilities
- NEW scheduling utility
- Direct QuickBooks integration
- Rules based workflow routing capability
- Facilitates drag and drop of files between CNG-SAFE and Windows Explorer

Potential Limitations

- Generic (vs. specific) integration with popular tax and audit software other than QuickBooks

Best Firm Fit: CNG-SAFE has enough flexibility built into it that it can be configured to meet the primary needs of any type of accounting and tax practice. Since it is not an accounting centric application, there are no direct integrations with traditional accounting and tax applications used in an accounting firm "out of the box." However, there is integration available for some of the popular accounting applications such as QuickBooks, MAS200 and Microsoft Dynamics.

Overview

Cabinet NG initially introduced its document management solution in 1999. As it approaches its 15 year anniversary, it is impressive to see how their total bundle of paperless solutions has evolved. CNG-SAFE is a horizontal solution that is designed to meet the needs of many different industries and offers a lot of configuration flexibility to support that market strategy.

Some of the more notable features of CNG-SAFE include:

- Built-in workflow tool that allows you to route documents either manually or based on rules, i.e. invoices > $500 go to the Controller for approval. You can route to a specific user or a group.
- CNG-Online option lets you procure and run CNG-SAFE in a hosted SaaS model, eliminating the issues related to managing your infrastructure, backing up your data and allowing access to your documents anytime, anywhere.
- The CNG-Web module provides the ability to manage and access documents filed in CNG-SAFE through a standard browser, iPad, or Android device.
- There is a bundle of integration tools available to further automate your workflows including:
  - CNG-Books a QuickBooks integration tool used to enter data into QBs and file the document into CNG-SAFE as a single process
  - CNG-WebSync is a unique tool that facilitates retrieving files from CNG-SAFE from within other web based applications
  - Retriever is a tool that allows you to retrieve CNG-SAFE files from within virtually any Windows application
  - Synchronizer utility lets you automatically create folders based upon new entries in another application. For example, if you add a new client to your practice management system the Synchronizer can trigger the setup of folders in CNG-SAFE to correspond to the new client.
  - An API (application program interface) allows you develop custom integrations with other applications.
- CNG Forms module lets you create custom electronic forms to replace your paper forms to facilitate a complete transition to paperless workflows. The forms can be integrated into your CNG-SAFE workflows
- CNG-Outlook is the module that facilitates the integration between Outlook and CNG-SAFE. The integration features include:

- Automatically route emails to a CNG folder based on customer/client

Security permissions are applied by assigning a "sensitivity" level to documents
- Portal access is available via CNG-WEB or using the included API

Summary & Pricing:

CNG is a comprehensive DMS solution with all of the subsidiary modules that are available. With the appropriate level of focus, you can significantly automate your paperless workflows. The ability to configure CNG to run through your browser and/or deploy it as a hosted solution gives you a full range of deployment options.

Technology