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DOCUMENT MANAGEMENT

2012 Review of eFileCabinet, Inc. — eFileCabinet Online

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eFileCabinet, Inc. — eFileCabinet Online

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Best Firm Fit

eFileCabinet (EFC) offers a complete document storage solution that has substantial flexibility in how you configure the metadata model for organizing your file storage. As a result, EFC has been deployed in a variety of business types, including accounting and tax practices. The system has been on the market for eleven years as a traditional desktop application. In 2011 the company introduced its new cloud based offering. This system can be a particularly good fit for firms that offer a diversity of services.

Strengths:

- Metadata is 100% configurable to meet your file organization requirements
- Ability to create multiple folder structure templates to apply based on client type
- Option to choose between on premise or cloud delivery model
- Intuitive / user friendly interface with Microsoft ribbon like interface

Potential Limitations:

- Though eFileCabinet's on-premise solution integrates with tax preparation software, the online version has no direct integration.

Features Overview

The metadata model is completely configurable. This allows you to setup a file organization model that resembles the nature of the documents and files you work with, regardless of the type of business model.

- Ability to setup pre-defined folder and sub-folder templates that can be applied to your clients on an individual basis. This lets you organize the files for your tax clients differently from your audit clients, or other niche service based clients.
- The interface resembles a typical Windows application with a simple ribbon type command interface. You can setup cabinets to organize files into primary categories; client files, administration, employees, etc. The desktop and cloud interfaces are similar so making the transition from one to the other will be easier.
- The "Send to EFC" button is the primary tool for sending files into EFC. You can use this button from within all of the MS Office applications and it will pull up the metadata values based on the type of document. You can also drag and drop files from Windows Explorer and assign metadata values at that time.
- The EFC print driver will generate a PDF file and will prompt you to select a document profile to assign the appropriate metadata values at print time.
- EFC Desktop facilitates scanning files directly into the system and includes an integrated OCR engine that converts the scanned image into searchable text.
- Document security features let you establish permissions at the drawer, i.e., client level.
- EFC Desktop includes a built-in client portal that can serve as an online document and file exchange center. This includes the ability for clients and others to upload files via the portal. In the future you will have the ability to brand the portal with your firm's identity.
- EFC Online is hosted in a secure data center that offers 256 bit encryption during file transfer and while stored. The files are backed up to redundant servers in the data center.

Summary & Pricing

The maturity of eFileCabinet with eleven years of history provides a higher level of confidence in the solution. The vendor claims that their number one customer feedback is "it's simple." Now that they offer both the desktop and cloud solutions

you have the option to deploy EFC in a model compatible with your IT strategy. Pricing for the desktop version starts at \$995 based on the number of users. The SaaS model is offered in three levels: Basic, Professional and Premium. Pricing is \$19, \$29 and \$39 per user, per month respectively. This includes 10 GB of storage.

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