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Brian Tankersley • Aug. 08, 2014



Overview

Cabinet SAFE CLOUD is a flexible document management system which was originally designed with accountants and tax professionals in mind. The product is still used and sold to clients by many accounting firms and value added resellers, but the company has expanded its vertical industry support to include law firms, financial services, manufacturing, and health care.

Documents are stored in a hierarchy which includes repositories, cabinets, folders, and tabs. Access permissions can be set at the repository, cabinet, folder, and individual file level.

The product is very structured, which makes the product easy for end users to learn

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small in-memory app called Cabinet SuperSearch, which allows users to search by keywords within folders, document names, and full text for supported file formats. Once a search is executed, users can enter additional search criteria to filter the results further.

Cabinet has a reseller program, and some accounting firms sell and install the Cabinet SAFE DMS to third parties as part of a technology consulting practice. The application uses Microsoft's SQL server database and ASP.NET technologies, and its user interface uses design layouts which give it an appearance similar to Microsoft applications like Outlook 2010. The product also has add-ons for use as client portals (Cabinet Share), web access (Cabinet Web), and document capture (Cabinet Advanced Capture).

Best Firm Fit

- Firms who want a product which can be accessed through a web browser or a client application with data housed either online or on local computers.
- Companies who need a document management system within the desktop version of QuickBooks

Strengths

- The product is a very structured, and is relatively easy to use, and has features like drag and drop between the software and Windows Explorer
- Direct QuickBooks integration and indirect integration into popular applications, including QuickBooks, Sage 100, SalesForce, and Microsoft Dynamics GP
- Options for on-premises or cloud hosting, and clients can use a browser or a client application
- Product has a software development kit for custom integrations with other applications.

- Workflow capabilities allow automated routing of documents.

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some niche practice areas.

Summary and Pricing

Cabinet SAFE CLOUD is \$70 per month per concurrent user (or \$50 per month per named user), with a one time setup charge averaging \$750. SAFE CLOUD provides 10GB of shared base storage per user, with additional storage available for \$1 per GB per month. The Cabinet SAFE software can be purchased for on-premises deployment. Pricing, including installation, licenses, and annual maintenance and support for on-premises deployments is available upon request.

2014 Overall Rating: 4.5 Stars

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