easy integration with other Thomson Reuters products. The product is available as an online version only, and works exclusively with the Internet Explorer browser.

Mary Girsch-Bock • Aug. 18, 2016

From the **2016 reviews of Document Management and Document Storage systems.**

Best Fit: GoFileRoom is part of Thomson Reuters CS Professional Suite of applications, and is well suited for larger firms that currently use other Thomson Reuters products.

Product Strengths:

- Product offers seamless integration with other Thomson Reuters product for greater product efficiency
- Cloud platform allows anytime/anywhere product access
- A variety of add-on modules increase product functionality
- The dashboard interface offers easy system navigation from one central screen

Potential Limitations

- Product will only work with an Internet Explorer browser

Thomson Reuters

www.gofileroom.com

800-968-8900

Basic System Functions 4.75 Stars

GoFileRoom is designed specifically for accounting and tax professionals and offers

can add shortcuts to various tasks. There are also several add-on modules that increase functionality, including the Workflow Manager that offers automatic routing functionality, as well as task assignment to qualified staff. Other add-on modules include ScanFlow, which uses barcode technology to quickly scan documents, TaxSort, which uses Optical Character Recognition (OCR) to automatically identify scanned 1040 documents, and Records Flow, which allows firms to easily comply with any document retention policies. Standard document management features such as version control and check in and check out capability are also found in GoFileRoom.

The product offers both basic and enhanced search functionality, with the use of the Document Browser Search option, which allows users to search multiple drawers simultaneously. Standard search options include searching by index fields, keywords, document name, or users can create a custom search and save it for future use.

Advanced Management and Archiving Features 5 Stars

Searching for a document will display a list of all available clients. Users can click on a client to access the currently saved documents. A toolbar at the top of the screen offers users quick access to various tasks that can be performed in the document area, such as the ability to edit, delete, review, and email the document. Firms can easily customize both the drawer structure and the index structure of GoFileRoom to suit their needs, and the QuickLaunch feature allows users to easily access documents from a desktop without logging into the product at all.

Drag-and-drop functionality allows users to easily manager Outlook emails messages, dropping them directly into a specific profile. System security allows users to assign password protection to all saved documents, as well as file drawers, ensuring that only authorized individuals are able to access documents. Document editing and annotating functionality can also be restricted by user as well.

Mentioned earlier, add-on modules increase product efficiency, including

GoFileRoom.

Client Collaboration Tools 4.75 Stars

Users can email clients PDF files securely, using password protection, or send to links to GoFileRoom users for quick document access. The NetClient CS Portal allows firms to securely send documents to clients, and clients can easily upload documents as well.

Integration 5 Stars

GoFileRoom offers complete integration with all optional modules, as well as with the CS Professional Suite of applications, including the NetClient CS Portals. The product also offers integration with all Microsoft Office applications, as well as all Adobe Acrobat products.

Support/Help 5 Stars

The Help-and-How-To Center offers uses access to various support tools for the entire line of CS Professional Suite applications. Users can search for product information by topic, browse FAQ's, and access getting started instructions, as well as a series of links to commonly performed tasks. There are also various training options available for system users, including web training, classroom training, on-demand training, and custom training options. Toll-free telephone support is available during regular business hours, or users can contact support via email as well.

Summary & Pricing

GoFileRoom is designed specifically for accounting and tax professionals and is ideally suited for larger firms that are looking for a complete practice management and document management product. Though not required, product training is

suggested in order to have the document management functionality structured