Cloud Cabinet Client Portals

AccountantsWorld

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From the 2018 reviews of client portal systems for accounting firms.

Cloud Cabinet from AccountantsWorld offers complete document management capability as well as unlimited client portals. Well suited for small to mid-sized accounting firms that are using other AccountantsWorld applications, Cloud Cabinet can also be used as a stand-alone document management and client portal solution as well.

Cloud Cabinet portals can be completely customized as desired for each client, with users able to create a flexible structure that is suitable for each individual client, or can opt to use the default folder structure. Users can also assign access rights for individual clients as needed, with the ability to assign different access rights for each folder and sub-folder created. Cloud Cabinet supports a variety of file formats including Microsoft Word, Excel, and PowerPoint, QuickBooks, Zip files, and all common image formats.

During product setup, users can assign specific permissions to each client that allows

purchase additional storage space if necessary. The client portals are bi-directional, so both firm users and clients can easily upload and download documents as needed. To get started, firm users simply provide their clients with login information in order to access the portal. Clients can be given additional login information for their employees to access the portal, particularly for payroll related information. All permission levels are maintained by the firm, determining what level of access any client has at any time.

Cloud Cabinet includes full text search capability, making it easy to locate a particular document. There is also an option to notify clients or colleagues via email when a file is available for downloading, with the same notification process used when a client uploads a document to the portal. Like the Cloud Cabinet portals, the Payroll Relief portals can be custom branded with the firm logo. For client employees that access the portal for payroll information, the portal can be custom branded with the client logo.

Cloud Cabinet offers excellent document security, with the product hosted at Amazon Web Services, using SAS70 Type IOI audited, ISO 27001 certified servers. In addition, all data is encrypted during transmission, with data stored on multiple servers in multiple locations. A client activity log is also available that displays system access by user, as well as a list of all document and files that have been uploaded, downloaded, emailed, or deleted.

Cloud Cabinet, like all AccountantsWorld applications, offers free, unlimited product support, with free training offered as well. All customers are assigned their own Professional Development Consultant, or they can contact support via telephone, email, or through the Contact Us page on the website, with support available during regular business hours. Free, web-based seminars are also available.

AccountantsWorld client portals seamlessly integrate with other AccountantsWorld

a custom portal for each client. The Payroll Relief portals serve as a method to provide payroll clients and their employees with access to payroll related data such as pay stubs and W2s. Cloud Cabinet is currently priced at $595 per year for any number of firm users, with the price including both document management and unlimited client portals. Base storage with Cloud Cabinet is 5GB, with users able to purchase additional storage if desired. Payroll Relief costs $1,495 for the first year, with price-per-check or price per payroll options available as well. Both Cloud Cabinet and Payroll Relief are included in AccountantsWorld Accounting Power, which runs $2,195 annually or $220 per month.

2018 Rating – 4.75 Stars

Firm Management