

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

PRODUCT & SERVICE GUIDE

Document Storage Products Typically Targeted to Specific Niches

Feb. 26, 2019

2929 Characters

2010 Document Storage Review

By John Higgins, CPA.CITP

Are you thinking about going paperless? If so, you will find this review of electronic document storage solutions for accounting and tax practices to be a helpful resource to shortcut your process of researching potential solutions. In last month's issue, we reviewed a series of document management systems (see www.CPATechAdvisor.com/go/XXX). So your first question is likely to be, "What's the difference between document **management** and document **storage**?" And that's a good question!

The primary distinction between document management and document storage solutions is the breadth and depth of functionality. Document management systems are designed as comprehensive enterprise solutions for automating the capture, storage and dissemination of all electronic documents and files in an organization. I recommend that you go back to last month's issue of CPATA and read about the specific features and functions of document management systems and the individual product reviews so you can compare and contrast the two groups.

The document storage solutions that we are reviewing in this issue typically have a more focused set of features and functions, which are often targeted to a specific niche such as direct integration with a particular tax prep package, integration with QuickBooks, or providing a secure file sharing solution. So you should read each of the individual product reviews carefully to help you gain a better understanding of the core strengths that each has to offer.

The specific attributes that we have evaluated for each product are organized into three fundamental categories: core functionality, integration and advanced functionality. The core functionality focuses on the overall user experience, based upon the interface and the ease of navigation, as well as the ability to publish documents directly to the system via a PDF print driver, and the nature of how the files are organized. In the integration category, our focus is on what options are available for an integrated scanning solution, integration with Outlook or other e-mail platforms, and the ability to support multiple file formats such as MS Word, Excel, etc. In the advanced functionality category, we look at what type of reporting is available, security features, document indexing and retrieval capabilities, and file archival features. We will also use this category to identify any unique features the vendor offers that distinguishes its solution from the rest of the crowd.

I hope you find these reviews helpful and encourage your feedback. I have been writing these reviews for CPATA for the past four years, and I am always interested in learning what information you find helpful. We have revised our review process this year in a way that we believe helps us to compare the products more consistently, with the realization that every product is unique. n

[Intuit, Inc.](#) • [Product & Service Guide](#) • [Reviews](#) • [Article](#)

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2023 Firmworks, LLC. All rights reserved