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**[www.efilecabinet.com](http://www.efilecabinet.com)**

As the name implies, eFileCabinet is designed to emulate a traditional paper file cabinet.

## Core Functionality

The files are organized in a typical cabinet > drawer > folder > sub-folder > document model. The initial view displays a list of client names as a link to their respective folders. The client's contact information is also displayed on this screen and can be used to search for the client's drawer. You can set up folder templates for consistency, and you can also set up common document names, i.e. 1040 tax return, to streamline the document upload process.

An eFileCabinet PDF print driver is included to print documents and reports directly to eFileCabinet. In addition, an embedded PDF document viewer is included, potentially eliminating the need to purchase Adobe Acrobat. Additionally, users can opt for a fully functional PDF editor program available as a part of the eFileCabinet package. 4.25

## Integration

Direct integration with MS Office lets you save files directly to eFileCabinet. Files can be uploaded directly from Windows Explorer using the right-click "send to" command. E-mail integration includes the option to apply a password and additional security restrictions on PDF files as they are being sent. One option even disables the ability to print the PDF.

An integrated client portal called Secure Drawer is available to share documents and files with clients. A scan button initiates scanning with any TWAIN-compliant

scanner and processes it in a PDF viewer that lets you preview each page of the

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eFileCabinet provides a comprehensive set of security features that allow users to achieve HIPPA, SEC and FINRA regulation compliance. Level one is role-based security permissions. Level two is the optional encryption of stored documents. This provides users with the ability to right-click and send documents as encrypted email attachments. Level three is a comprehensive log of all document/user activity.

An archive utility allows you to set up an “archive” cabinet that is stored on an alternate storage device. You can selectively choose specific cabinets or folders, such as a particular year, that you want to move to the archive cabinet. 4.25

## Summary & Pricing

eFileCabinet is a practical document storage solution. The current release is version 4.0, and it is scheduled for an upgrade to version 5.0 later this summer. Pricing starts at \$995 for a single-user system.

### 2010 Overall Rating 4.25

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