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and can be completely customized by users. Once a repository is created, users can ...

Mary Girsch-Bock • Sep. 16, 2019



**PSIsafe**

**PSIGEN**

[www.psigen.com](http://www.psigen.com)

From the 2019 reviews of [Document Management and Storage](#) systems for accounting firms.

After purchasing Cabinet SAFE and Cabinet SAFE Cloud in 2017, PSIGEN introduced PSIsafe, a comprehensive document management application best suited for mid-sized and larger companies, offering solutions for healthcare, financial services, human resources, and other businesses. PSIsafe offers both on-premise and cloud deployment options, and includes a mobile app for easy document access from any location.

PSIsafe offers an updated user interface with three navigational themes to choose

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set up, folders are then placed in the appropriate cabinet.

Users can preview any document, edit the document or the document description, lock documents to prevent unauthorized access, and suspend a document if necessary. PSIsafe also offers complete document versioning, and the audit function provides managers with a complete history of document access, including edits made to the document. The product also supports parent/child document sets, and users can easily export or email a document if desired. Drag and drop capability is included in PSIsafe, so users can move documents from their desktop or laptop directly into the application.

When adding a new document, users can choose to add a document individually or use the batch utility feature that can easily process multiple documents in a variety of formats. A default template is included in PSIsafe which users will need to use in order to add a new document. Users also have the option to create a custom template or edit an existing template to better suit the needs of their firm, and can also scan documents from a direct-connect scanner.

PSIsafe offers advanced document search options throughout the application, including full text search capability, even within a folder. Users can use common search terms when trying to locate a file, including keyword, document creator, document title, creation date, and modification date, with an option to search by file size. PSIsafe also offers excellent workflow capability, including the ability to route documents to the appropriate party. Recipients can choose to approve or reject any document received, edit the document if necessary, return the document to the original sender, or email the document as needed.

PSIsafe offers excellent security option, with multiple document and folder access rights available including None, Preview, View, Edit, Create, Delete, and Lock. The

product also offers 128-bit encrypted file transfer, 256-bit encrypted data storage, as

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offers advanced document capturing capability. PSIGEN also offers includes an open API, which provides easy integration with third-party applications including Salesforce and Redtail.

All first-tier support is handled exclusively by PSIGEN resellers, with second-tier support handled by PSIGEN support staff, with users able to request support during business hours or through the support portal. Customers have access to the PSIGEN knowledgebase, which is available around the clock as well as all scheduled product releases and standard product upgrades and fixes, which can be downloaded from the PSIGEN website at any time. Clicking on a PSIGEN product will display a management guide, an end user guide, and a web guide, with guides offering search capability and a troubleshooting option.

PSIsafe is a powerful document management solution that is best suited for mid-sized to larger businesses including accounting firms that have more complex document management needs. PSIsafe currently offers three bundles; Business Essentials, Professional, and Corporate, with both the Professional and Corporate versions available as either an on-premise solution or on the cloud. PSIGEN offers a demo for all editions, though a download of the application is not available at this time. Those interested in PSIsafe should contact PSIGEN directly for pricing.

## **2019 Rating – 4.75 Stars**

Firm Management

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