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Mary Girsch-Bock • Oct. 18, 2019



AccountantsWorld Cloud Cabinet Client Portals

AccountantsWorld

www.accountantsworld.com

From the 2019 reviews of client portal systems for accounting firms.

Cloud Cabinet from AccountantsWorld offers both document management capability as well as client portals. Well suited for small to mid-sized accounting firms, Cloud Cabinet can be used as a stand-alone document management and portal solution, or ideally used in conjunction with other AccountantsWorld applications.

Cloud Cabinet offers an unlimited number of client portals for one price, with each

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Cloud Cabinet offers a shared folder option, that allows users to share folders internally with colleagues as well as their clients. The product also offers easy file transfer capability with the use of Cyber Drop, which replicates the program structure on a desktop, laptop, or other device, allowing users to easily drag and drop documents directly into Cyber Drop for future sharing.

Cloud Cabinet does not have any size restrictions for files, with the product initially offering 5GB of storage in the application, though users can choose to purchase additional storage space when purchasing the application, if needed. All client portals are designed to be bi-directional, so files can be easily uploaded and downloaded between firms and clients.

Firm users will provide their client with their initial login information, and clients with payroll services will also be able to share portal access with their employees. All permissions are maintained by the firm, so client access levels can be changed at any time.

Cloud Cabinet includes complete text search capability, making it easy to locate any document in question. The application can also notify users when a file has been uploaded or downloaded. All client portals can be customized to reflect the firm's branding and marketing details, with the ability to include logos, identifying colors, and other details. Clients that use payroll services can have the payroll portal branded with their logo, a nice touch for employees that will access the portal for payroll information.

Cloud Cabinet, like all AccountantsWorld applications, offers excellent online security, with the product hosted at Amazon Web Services, using SAS70 Type IOI audited, ISO 27001 certified servers. All data stored or transmitted in the portal is encrypted, with data stored in multiple locations, using multiple servers. Good audit

trail capability is also offered, with a client activity log displaying all system access

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AccountantsWorld client portals are designed to integrate with other AccountantsWorld applications including Accounting Power, Website Relief, Practice Relief, After-the-Fact Payroll, and Payroll Relief, so users can easily transfer files from these applications directly into Cloud Cabinet. Third party integration is limited, though the product does integrate with QuickBooks, Sage 50, and similar applications.

AccountantsWorld offers portals in both the Cloud Cabinet and Payroll Relief modules, with an unlimited number available for use. For firms offering payroll services to their clients, the Payroll Relief portals can also provide clients and their employees with access to payroll related information such as paystubs and W-2s. Those interested in Cloud Cabinet can contact AccountantsWorld directly for pricing information or purchase the application directly from the AccountantsWorld website. Additional storage is available to purchase as well, and all AccountantsWorld applications come with a 60-day money back guarantee.

2019 Rating – 4.75 Stars

Firm Management

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