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FIRM MANAGEMENT

2020 Review of Cloud Cabinet from AccountantsWorld

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AccountantsWorld Cloud Cabinet

www.accountantsworld.com

From the 2020 reviews of Document Storage and Document Management systems.

Cloud Cabinet from AccountantsWorld is best suited for small to mid-sized accounting firms. Cloud Cabinet can be used as a stand-alone document management application, but works best when coupled with other AccountantsWorld applications.

Completely cloud-based, Cloud Cabinet offers online document storage capability as well as an unlimited number of client portals that can be used to share and exchange documents with clients. For those looking to move toward a paperless office, Cloud Cabinet can play a major role in reducing the number of physical documents in the office.

With cloud access, staff and firm administrators have easy access to stored documents from any location with an Internet connection. Cloud Cabinet supports all file formats, including Microsoft Word, Excel, and PowerPoint; it supports common file types such as TXT and Zip files, as well as QuickBooks file formats and image files. In addition to automatically transferring documents to Cloud Cabinet from within AccountantsWorld, users can easily transfer documents directly into Cloud Cabinet from other third-party applications.

During the setup process, firm administrators can create a default folder set, which standardizes folders for each client, ensuring consistent retention policies are created across all folders. Users can easily add, edit, or delete clients directly from the firm administration screen, and can specify during initial folder setup whether clients have access to the files.

Cloud Cabinet uses a flexible file folder that can be customized to suit the needs of each client. There are three types of folders offered in the application: a Client Folder, which is accessible to both the client as well as staff members; a Staff-Only Folder; and a Shared Folder, which can be accessed by all clients and all staff, and is ideal when sharing non-personal information such as a newsletter, client organizers, general tax forms, or general announcements. Custom access rights can be created for any Cloud Cabinet folder or sub-folder to ensure that only authorized parties can access the folder contents.

Users can access folders and store and manage files using the Client Folders tab, while the CloudUpload utility is designed to mirror the current Cloud Cabinet folder structure on a PC, upload the stored file to the correct corresponding file in Cloud Cabinet. Users will have to install the utility prior to using it. Users can also scan documents directly into Cloud Cabinet, bypassing the need to save them to a PC first,

with the application working with a scanner that has a TWAIN interface. Users can easily scan a single document or scan a large number of documents quickly.

Cloud Cabinet allows users to upload standard documents choosing a variety of file formats including image files, email files from [Outlook\[GP2\]](#) , HTML files, as well as files from AccountantsWorld applications. Document search capability in Cloud Cabinet is good, with both basic and advanced search options, making it easy to locate any stored document.

One of the best features in Cloud Cabinet is the unlimited client portals that are included in the application at no additional charge. Each client is provided with a password in order to access their portal, with users able to assign access levels to each client, or create the same client access levels across the board. The portals are bi-directional, so both clients and staff can upload and download files, and both parties are notified when a file has been placed in the portal.

Cloud Cabinet keeps documents safe, using Amazon Web Services (AWS) secure data, and all data is securely encrypted whether stored or in transit. Users can also track client activity by access the Client Activity Log, which provides a detailed list of all actions taken in Cloud Cabinet during a specific timeframe, with users able to view date and time, client name, activity, action taken, and item name, if changes were made.

Cloud Cabinet offers complete integration with other AccountantsWorld applications including Accounting Power, Payroll Relief, and After-the-Fact Payroll, with users conveniently able to save and access stored documents from within these applications directly into Cloud Cabinet.

AccountantsWorld offers a variety of user resources that can be accessed from within the application, including a robust help system and training videos. Users also have access to webinars, as well as various eBooks that can be downloaded from the AccountantsWorld website. Support is accessible from within the application, and telephone support is available during regular business hours and on Saturday. In addition, all AccountantsWorld users have access to a Professional Development Consultant who provides assistance throughout the software setup process.

Cloud Cabinet from AccountantsWorld is a good fit for small to mid-sized accounting firms that currently use other AccountantsWorld applications, and it can be used as a stand-alone document management application as well. Those

interested in Cloud Cabinet can contact AccountantsWorld directly for pricing information or to view a demo.

2020 Rating 4.75 Stars

Strengths:

- Strong integration with other AccountantsWorld applications
- Offers an unlimited number of portals at no additional cost
- Anytime/anywhere cloud access

Potential Limitations

- Better when used with other AccountantsWorld applications

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