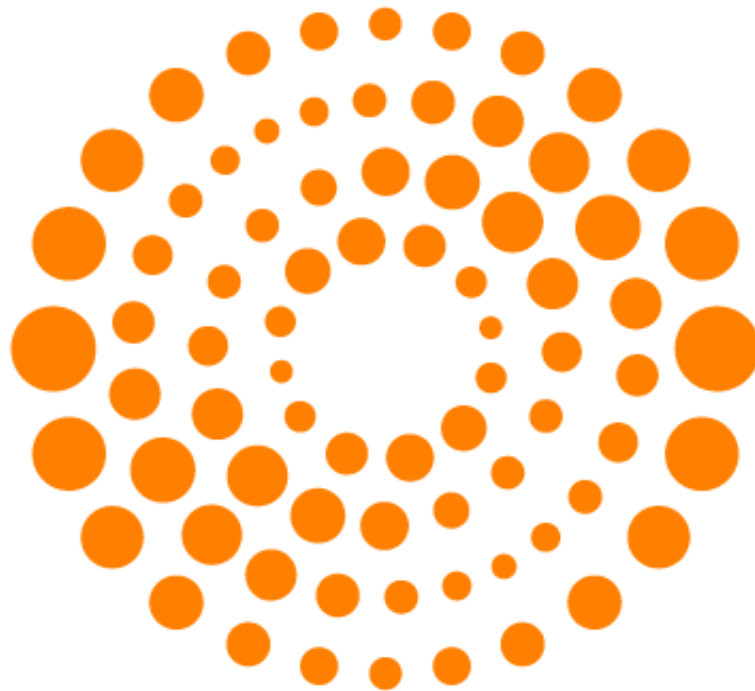


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REUTERS**

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complex document management needs and works best when coupled with other GoFileRoom Professional Suite applications.

Along with document management, Thomson Reuters offers additional components that can be used as part of Thomson' Reuters' integrated cloud audit suite. These include FirmFlow, which streamlines the workflow process by routing documents to the appropriate party, AdvanceFlow, which is audit management software that provides working trial balance capability, and ScanFlow, which offers barcode scanning of documents, saving them to the appropriate location automatically.

GoFileRoom includes an intuitive user interface that can be customized for each system user. The application uses a dashboard for easy navigation, allowing users to easily view multiple options from a single page. Users can also access and view a list of clients from the dashboard, which also contains an alerts list, where any alerts connected to the client will be displayed.

GoFileRoom is completely customizable so users can customize drawers, index structures and workflows to better suit their needs. The application supports multiple file formats and can easily scan multiple documents using ScanFlow, which provides easy bulk scanning for multiple documents. Once scanned, the documents are automatically converted to a PDF, then they are then filed in the appropriate location in GoFileRoom. In addition, GoFileRoom integrates with Microsoft Office applications, allowing users to save and edit Office files in GoFileRoom in seconds.

GoFileRoom includes a Rules Wizard, where firms can create firm-wide rules for document storage, management, and archiving. The recently enhanced Document Browser Search function allows users to search multiple drawers simultaneously or use the available search option with keywords, index fields, or even a keyword within a document. Users are able to save searches using the QuickLaunch Tool,

which allows users to save documents on their desktop for quicker future access. The

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GoFileRoom has seamless integration with NetClient CS Portals and the Client Center, powered by Onvio, which provides secure file exchange between firms and clients. The Client Center portal is available for use on any mobile device, including a direct upload to GoFileRoom.

GoFileRoom offers enterprise level security, preventing unauthorized access to documents. Firm managers can restrict document viewing, annotating and editing, and they can maintain user accounts and passwords as desired. The application also includes complete audit trail capability that can log all system activity including a list of every action taken on each document.

Designed to work with other Thomson Reuters applications, GoFileRoom offers integrates with other applications in the Thomson Reuters suite, including FirmFlow, which offers automated document routing, TaxSort, which uses OCR technology to quickly identify and sort tax documents, and RecordsFlow, mentioned earlier, that allows users to create a firm-wide retention policy. GoFileRoom integrates with other CS Professional Suite applications including Accounting CS, Accounting CS Payroll, Workpapers CS, FileCabinet CS, Practice CS, NetClient CS, Fixed Assets CS, and UltraTax CS. The application also seamlessly integrates with GoSystem Tax, as well as third-party applications SurePrep and Adobe Acrobat, and Microsoft Outlook .

Help options are easily available from any user screen in GoFileToom. Additional help and support resources are also accessible from the Thomson Reuters website which features the Help and How-To Center, where users will find a searchable knowledge base, a list of trending topics and support issues, and a video library. A variety of product training options are available for all users which include web training, and on-demand training, with consulting and professional services offered as well. Toll-free telephone support is offered during regular business hours, and

users are able to access support via email as well. In addition, new users will

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the cloud as a subscription, those interested can request additional information or custom pricing directly from Thomson Reuters.

2020 Rating 4.75 Stars

Strengths:

- Highly customizable
- Integrates with all CS Professional Suite applications
- The Rules Wizard makes it easy to create document rules across the board

Potential Limitations:

- Not really suitable for smaller firms
- Works best with other CS Professional Suite applications

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Firm Management

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