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AccountantsWorld Cloud Cabinet

www.accountantsworld.com/CloudCabinet.html

From the [2020 reviews of client portals](#) for accounting firms.

Cloud Cabinet Client Portal is ideal for small firms already invested in the AccountantsWorld ecosystem. Due to its tight integration into their other solutions, 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. Customers can easily transfer files from these applications directly into Cloud Cabinet. You may find that third-party integration is limited, but the product does play nicely with QuickBooks, Sage 50, and some other well-known bookkeeping brands.

Cloud Cabinet is first and foremost a document management system with the client portal solution directly integrated to that. Those familiar with other

AccountantsWorld products will feel right at home. There is little to no learning

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User access rights can also be controlled on the folder and subfolder level based on the role of a firm or client staff member. This allows firms to rigidly restrict private information, as well as to provide varying levels of read-only or edit rights. Firm and client users with appropriate access rights can upload or download files in the system. An audit trail of all activity is available to maintain controls. Firms can use Cloud Cabinet to file and share virtually any format of document, including Word, Excel, CSV, PowerPoint, and images.

Individual file size is not limited, however, users are initially limited to 5GB of space with base pricing, which is not that much if dealing with images, but should suffice for basic documents. Additional storage can be added for a fee. The system uses a simple drag-and-drop function (called Cyber Drop) to place files into a shared folder, and the function works on desktops, laptops and mobile devices.

Firms offering payroll services can use the portal functions in the AccountantsWorld Payroll Relief system, which have the option to provide employee access to personal pay histories, W-2s and other information through the same system. Firms offering this option to clients can charge as they deem appropriate.

Cloud Cabinet has high-level security, with the system hosted by Amazon Web Services using SAS70 Type IOI audited, ISO 27001 certified servers.

Unlimited support is included with the purchase of Cloud Cabinet and free webinars are offered. Additional advanced training is available as an option.

Contact AccountantsWorld directly for pricing information or purchase Cloud Cabinet from the AccountantsWorld website. All AccountantsWorld applications come with a 60-day money back guarantee.

2020 Rating: 4.75 Stars

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