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stored documents at the office, at home, or on the road.

Mary Girsch-Bock • Dec. 18, 2017



AccountantsWorld Cloud Cabinet

www.accountantsworld.com

From the Dec. 2017 Review of Document Management & Storage Systems.

Cloud Cabinet, from AccountantsWorld offers excellent document storage and management capability. The product also doubles as a document sharing portal, allowing easy sharing of documents with clients. Cloud Cabinet is an ideal option for accounting firms already using other AccountantsWorld applications, though the product can be used as a stand-alone solution as well.

Cloud Cabinet is completely cloud-based, so firm employees can easily access stored documents at the office, at home, or on the road. It is designed to be used in conjunction with other AccountantsWorld applications. The product supports all common file formats including Word, PDF, Excel, PowerPoint, Text, QuickBooks, Zip, as well as all common image formats.

Cloud Cabinet includes a default folder structure that firms can utilize when storing

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The Cyber Upload feature simplifies the file transferring process by replicating the Cloud Cabinet structure on the user's computer. This allows users to easily drag and drop any document directly to the Cyber Drop folder. When the drag and drop process is completed, users can then upload the documents stored in the folder directly into Cloud Cabinet. Users can also scan documents directly into Cloud Cabinet without the need to save them first. Cloud Cabinet works with any scanning device that uses a TWAIN interface, and users can also upload numerous documents in batches if desired.

Along with documents, invoices, and images, users can upload emails into Cloud Cabinet in a variety of formats including Outlook, Text, and HTML. Those using other AccountantsWorld applications can easily upload documents directly from those applications, and emails can be uploaded in a variety of formats including Outlook, HTML, and Text formats. The product also offers a variety of tools to make data search easy, with users able to use full-text search to locate any document that is stored in the system.

The included client portals allow firms to easily share documents with their clients. Each client is provided with a password for system access, and all files uploaded and downloaded are encrypted during the transfer process. Firms can allow clients to only access documents through the portal or give them permission to upload files to the portal as well. There is also an option for users to notify clients via email when a document is available to be downloaded. This same feature can be used to notify staff when a client uploads a file to the portal.

Cloud Cabinet also offers excellent security, using Amazon.com data centers. The application also offers unique user names and passwords to access the system. There is also a client activity log available that allows users to see who has accessed the system during any given time, as well as the list of documents and files that were uploaded, emailed or deleted.

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Cloud Cabinet from AccountantsWorld offers solid document storage/management capability along with an excellent document sharing portal. Though Cloud Cabinet can be used as a stand-alone application, those using other AccountantsWorld applications will gain greater benefit of the application. Cloud Cabinet pricing currently runs \$595.00 per year and includes both document management and client portals. The system includes 5GB of storage with additional storage (5GB) available for \$25.00 per year. AccountantsWorld also offers a 30-day money back guarantee on the product.

2017 Rating 4.75 Stars

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