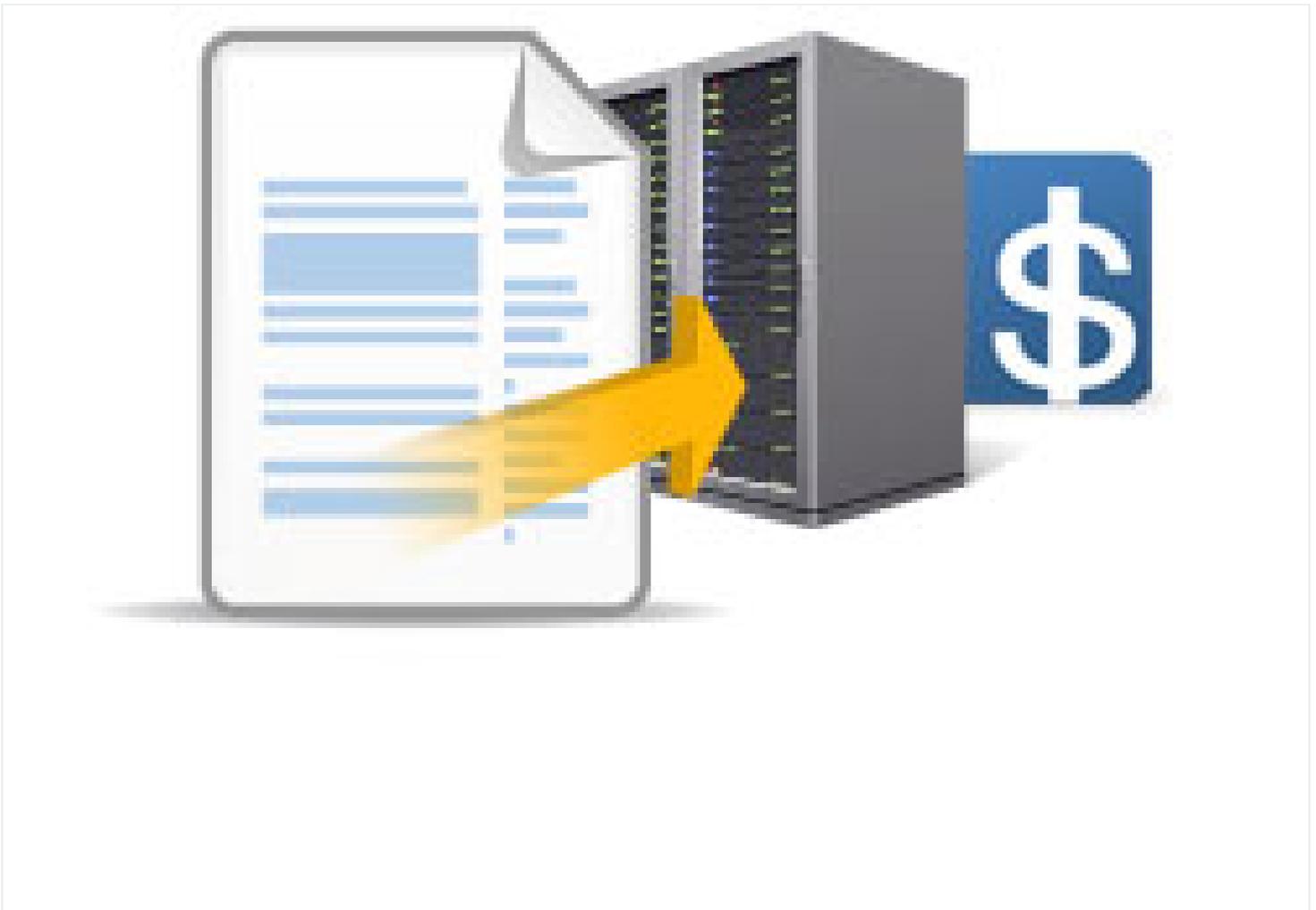


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system designed for firms of all sizes. FileCabinet CS can be used as a stand-alone application, but works best in conjunction with other Thomson Reuters CS suite of applications.

Mary Girsch-Bock • Dec. 18, 2017



Thomson Reuters FileCabinet CS

www.csthomasonreuters.com

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

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Documents can be published in FileCabinet CS for multiple years, with easy filtering to eliminate old or inactive clients. Users can also add notes to any client drawer, and users can choose to hide older documents, making the more up to date documents readily accessible.

Users can choose to store documents in their native format, though files shared with clients are typically stored as a PDF. A batch system is also available for firms that regularly process multiple documents for their clients. Integration with Microsoft Office allows users to easily store all emails directly into a client folder as desired.

For firms that handle multiple documents for their clients, a batch system is available that allows users to easily process multiple documents simultaneously.

For easy document access, users can label each page as it's stored. Folders are easily accessible by simply entering the first few characters of a client's name or I.D. number. Users can also search for documents using key words or by document name. For more complex clients, users can add subfolders, and all documents can be archived for safekeeping. Users can also choose to drag and drop files directly into FileCabinet CS, or scan documents in using any TWAIN compliant scanner. And the Image Groups Dialog allows users to organize any scanned images including changing the order of pages within an image group, reassigning pages to a different group, or adding annotations or keywords to scanned images for easier future access.

FileCabinet CS offers complete integration with other CS Professional Suite of applications including UltraTax CS, NetClient CS, Fixed Assets CS, and Practice CS. The product also offers seamless integration with Microsoft Office applications, installing a custom toolbar in Word, Excel, and PowerPoint, embedding the files so that they can be edited in FileCabinet CS rather than returning to the original application to make any changes. Integration with Outlook allows users to create

and send client emails directly from FileCabinet CS. There are also options to

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to be accessed. Clients can also upload documents to the portal as well. All documents in the portal are stored as a PDF, eliminating the possibility of edits made to a document.

CS Professional Suite offers excellent tools and resources for users, including the Help and How-To Center, which offers access to a searchable knowledgebase, access to a video library, and a Getting Started option that assists users with options for exploring the product menu and toolbars, keyboard shortcuts, and FAQ's. There are also resources available for configuring the product, performing common tasks, and even a walk-through PDF, which guides users through every aspect of the product. Both standard and custom training is available as well. FileCabinet CS also offers product support via telephone, email, or chat, with support available during regular business hours.

FileCabinet CS is an excellent choice for firms already using other Thomson Reuters CS Professional Suite of applications. Users can purchase the software as an on-premise solution, or have it hosted by Thomson Reuters. A SaaS option is also available for those that prefer to lease. Pricing for FileCabinet CS starts at \$940.00, depending on the licensing option chosen. Client portals are available at an additional cost, though Thomson Reuters does offer volume licensing discounts.

2017 Overall Rating 4.75 Stars

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