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**Mary Girsch-Bock** • Dec. 18, 2017

**Thomson Reuters – GoFileRoom**

[www.gofileroom.com](http://www.gofileroom.com)

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

GoFileRoom is part of Thomson Reuters CS Professional Suite of applications, and is best suited for larger accounting firms that are currently utilizing other Thomson Reuters products.

GoFileRoom is cloud-based, so users can easily manage documents from any location using any device with an Internet connection. Designed specifically for accounting and tax professionals, GoFileRoom optionally offers complete workflow management capability, as well as seamless integration with other Thomson Reuters applications. Fully customizable, firms can create custom drawers, index structures, workflows, and reporting options to suit their needs. GoFileRoom also contains a Rules Wizard, which new system users can utilize to simplify the process of building rules for document storage and archiving.

Users can easily access and store files directly from the desktop without logging into the application. GoFileRoom supports multiple file formats and stores documents in their native format, and the optional ScanFlow add-on allows users to scan documents in bulk, automatically converting scanned documents to PDF's.

The product offers extended integration with Adobe Acrobat for document annotating, bookmarking, along with the ability to merge, append, and highlight documents as needed. Users can easily establish and follow document retention

policies throughout the firm, and the product offers excellent search capability, with

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passwords, and overall system access levels and an audit trail is available for management to monitor as desired. GoFileRoom uses 128-bit SSL encryption, with the product hosted from multiple data centers to ensure continuous system availability.

GoFileRoom integrates seamlessly with NetClient CS Portals, so users can easily share documents with clients. The portal option is created as an extension of the firm's website, with clients able to enter their user name and password in order to access uploaded documents. Electronic signatures can be requested through the portal, and clients can easily upload documents directly to the portal as well. All portal documents are in read only format, ensuring that files will not be edited by clients.

GoFileRoom offers several optional modules that can work together to increase product functionality, including the Workflow Manager that manages documents and ensures proper, timely routing for documents, ScanFlow, which utilizes barcode technology to quickly scan documents, and TaxSort, which utilizes Optical Character Recognition (OCR) to quickly identify 1040 source documents, organizing the documents into a bookmarked PDF. Also available is RecordsFlow, which allows firms to create and adhere to a set document retention policy. RecordsFlow is included with GoFileRoom, and does not require a separate license. GoFileRoom offers excellent integration with a variety of Thomson Reuters applications such as UltraTax CS, GoSystem Tax, ProSystem fx Tax, Lacerte Tax, Practice Management CS, Engagement CS, ProSystem fx Engagement, and Caseware. The product also offers complete integration with Microsoft Word, Outlook, and Excel, as well as Adobe Acrobat applications.

A Help option is available from the GoFileRoom user interface, allowing users to quickly access product help. The Thomson Reuters Help and How-To Center provides users with a variety of resources, along with various help and support options. Users

can quickly search for information on a specific product, browse the FAQs, and

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RecordsFlow, GoFileRoom manages documents at every stage, even as they're being actively accessed and edited. GoFileRoom offers a Best Practices Guidebook that helps to guide users through the entire implementation process.

GoFileRoom is available as a monthly subscription, with pricing dependent on the number of users. All add-on modules and training options are priced separately, with pricing available directly from Thomson Reuters upon request.

## 2017 Rating 4.75 Stars

Firm Management • Technology

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