eFileCabinet Document Management

www.efilecabinet.com

From the 2018 reviews of Document Management and Documents Storage Systems for accounting firms.

eFileCabinet is a powerful document management solution that is well-suited for accounting firms of any size, though the product can also be used in a variety of office settings, including real estate, property management, law offices, and health care.

eFileCabinet offers both onsite and online deployment options, and the product is extremely scalable, with four versions available, though the Basic version only offers file sharing capability. The Advantage, Business, and Enterprise editions offer

complete document management, file sharing, and Microsoft Office integration.

eFileCabinet supports multiple file formats, though users can easily convert any document to a PDF if desired. The Details menu in the application allows users to perform a variety of management functions, including Previews & Comments, where users can preview a document and add any relevant comments; Permission, which allows users to set access rights to the document; Retention, which allows users to set retention values for each document; Versions, which can manage multiple versions of a single document; and an Audit Log, which provides details of all document activity. Users have the option to save a new, edited version of any document, while retaining the original document as well. Document check-out and check-in is also available in eFileCabinet, and the application offers document routing capability as well, including the ability to assign multiple paths within the designated workflow. eFileCabinet also offers Zonal Optical Character Recognition (OCR), an add-on module that will automatically route documents to the correct destination in the product, while SecureDrawer allows users to share documents securely with colleagues and clients alike. SecureDrawer easily handles documents of any size and recipients do not need to have a SecureDrawer account in order to access files. SecureDrawer works with the online and onsite versions of eFileCabinet.

Another time saving feature in eFileCabinet is the SideKick, which allows users to easily access stored documents without the need to log into each application. SideKick also simplifies drag and drop capability, making it easy to add up to 50 files at one time, including emails and other documents, eliminating the need to access and toggle between multiple applications. Documents can also be directly scanned into eFileCabinet using SideKick, which allows users to choose the default location and file name, editing any information as needed. SideKick also features a new Quick Access Menu, that allows users to quickly access recent documents, favorites, tagged documents, and checked out items.

The online edition of eFileCabinet uses SSL/TLS encryption on all data, with a

eFileCabinet users can access Help resources directly from the application, or from the eFileCabinet website. Resources available include FAQs, as well as detailed product support and training options. The product support page includes a variety of training videos, product setup and installation options, and manuals for eFileCabinet as well as for specific features such as SideKick and Workflow. Product release notes are available as well. Users can contact support via telephone, email, or online chat, with support included in all editions of eFileCabinet except for the Basic edition. On demand training options are also available, with training accessible at any time.

eFileCabinet is an affordably priced, robust document management application that is well suited for a variety of businesses, including accounting firms. eFileCabinet offers both onsite and online versions of the document management application, with pricing starting at $15 per user, per month for the Basic edition, which offers only file sharing capability. The Advantage edition is designed for 3 or more users and runs $30 per user, per month, while the Business version is $55 per user, per month, with all add-on applications billed separately.

2018 Rating – 5 Stars

Firm Management

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