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GoFileRoom

Thomson Reuters

www.gofileroom.com

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

GoFileRoom from Thomson Reuters is part of the CS Professional Suite. GoFileRoom is best suited for larger accounting firms that are currently using or plan to use other CS Professional Suite products. GoFileRoom is completely cloud-based, making it

easy for both onsite and remote employees to manage and access documents from

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with users able to create custom drawers and index structures to suit their needs. A Rules Wizard tool is also available that allows users to build both firm-wide and individual rules for document storing and archiving.

GoFileRoom offers several desktop productivity tools such as the Control Panel and Quick Launch, that allows documents to be stored on the desktop for easy file retrieval without the need to log into the application. GoFileRoom supports multiple file formats, storing all documents in their native format. Users can search for documents using a variety of search fields, keywords and even keywords within a document, or use the QuickLaunch tool for even quicker searching. Using the optional ScanFlow module allows users to scan documents in bulk, with GoFileRoom automatically converting documents to PDF while also filing them in the correct location using barcode technology.

GoFileRoom also includes document management tools with a variety of options available including annotation, bookmark, merge, append and highlight through integration with Adobe Acrobat. Integration with Microsoft Outlook allows users to drag and drop email messages directly into an existing GoFileRoom profile. Users can also send secure documents using dynamic document links and have the ability to add a password to any PDF sent for additional security. In addition, the product also offers management features such as version control and a document check-in/check-out option.

GoFileRoom offers a variety of security options including the ability to customize system level access for each user. All files are stored on GoFileRoom servers, which are located in multiple data centers, offering complete system backup and disaster recovery. The product uses 128-bit encryption and tracks all user sessions for a complete audit trail.

GoFileRoom does not include a portal, but the product does seamlessly integrate

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documents and save them to the correct location. TaxSort users optical character recognition (OCR) to automatically identify and organize scanned 1040 source documents, and RecordsFlow automatically complies with firm document retention policies, tagging documents for archive storage as well as those that need to be destroyed. GoFileRoom also integrates with other Thomson Reuters applications including UltraTax CS, GoSystem Tax, ProSystem *fx* Tax, Lacerte Tax, Practice Management CS, and others. The product also offers integration with Microsoft Office applications as well.

Users can access Help options from any screen in GoFileRoom, with help options available from the Thomson Reuters website, including the Help and How-To Center, which allows users to enter search terms to look for answers, access search options, and contact support directly. Trending topics are available for review, and a video library is available as well. Thomson Reuters also offers a variety of product training options, including on-demand, web, and classroom training. Toll free telephone support is also offered, with users able to contact support via email as well. In addition to the help resources listed above, GoFileRoom also offers a Best Practices Guidebook designed to guide users through the initial product setup and implementation.

Designed to be a piece of a much-bigger puzzle, GoFileRoom is well-suited for larger accounting firms that are currently using other Thomson Reuters applications. Available as an online application delivered via a monthly subscription, those interested in GoFileRoom can contact Thomson Reuters directly for more information and a price quote for their firm.

2018 Rating 4.75 Stars

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