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to access and store documents from any location. The application supports all file formats including Microsoft Word, Excel, and PowerPoint, TXT files, QuickBooks ...

Mary Girsch-Bock • Sep. 16, 2019



AccountantsWorld Cloud Cabinet

AccountantsWorld

www.accountantsworld.com

From the 2019 reviews of [Document Management and Storage](#) systems for accounting firms.

Cloud Cabinet from AccountantsWorld is well suited for small to mid-sized accounting firms that currently use other AccountantsWorld applications. Cloud Cabinet can be used as a stand-alone document storage application as well. In addition to online document storage capability, Cloud Cabinet also includes unlimited client portals that firms can use to share and exchange confidential

documents with clients. The product can also be used in any firm to help manage

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Cloud Cabinet includes a default file structure for storing all client documents, though users can modify the structure if desired to better suit their needs. In addition, users can choose to set up each client folder individually. A shared folder option is also available, where users can store all common documents that should be accessible to all clients, such as client organizers, tax forms, and general announcements. Users can set custom access rights to any folder and sub-folder created in Cloud Cabinet, allowing only authorized users to have access to the documents.

The CyberDrop feature in AccountantsWorld allows users to replicate Cloud Cabinet's file structure directly on their PC. This enables users to drag and drop documents directly into the folder, where they can be stored until uploaded directly into Cloud Cabinet. Users can also scan documents directly into Cloud Cabinet without the need to save them to a PC. Cloud Cabinet works with any scanner that utilizes a TWAIN interface, with users able to scan a single document or can choose to utilize the batch process function in order to process a large number of documents quickly.

Cloud Cabinet supports multiple document types, with users able to upload standard documents in a variety of formats, including multiple types of image files. Emails can also be uploaded into Cloud Cabinet, with file formats including Outlook, Text, and HTML files supported as well. Both basic and advanced search functionality is available in Cloud Cabinet, making it easy to quickly locate any document stored in the application.

Cloud Cabinet offers an unlimited number of client portals, which are included at no additional charge. Clients receive a unique password that allows them to access the portal, with users able to set client access levels for the portal, with limited and complete access levels available; allowing clients to upload and download

documents to and from the portal. Both clients and firm users can be notified when a

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Cloud Cabinet is a completely integrated application, working seamlessly with other AccountantsWorld applications including Accounting Power, Payroll Relief, and After-the-Fact Payroll, with users conveniently able to save and access stored documents from within these applications directly into Cloud Cabinet.

AccountantsWorld offers good help and support options including a variety of help options that can be accessed from within the application. Users also have access to a variety of webinars, and product support is available via telephone during regular business hours. All product support is included in the cost of the application, and users can also request support via email using the 'Contact Us' option available on the website. All AccountantsWorld users have access to a Professional Development Consultant, who provides assistance throughout the software setup process.

Cloud Cabinet from AccountantsWorld is best-suited for small to mid-sized accounting firms that are using other AccountantsWorld applications, though the product can also be used as a stand-alone document storage application if desired. Cloud Cabinet is currently available from AccountantsWorld for \$595 per year, and includes 5GB of storage space, with additional space available to be purchased if necessary. Cloud Cabinet, like all AccountantsWorld applications, offers customers a money-back guarantee to those cancelling their subscription within 30 days of purchasing.

2019 Rating 4.75 Stars

Firm Management

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