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Mary Girsch-Bock • Sep. 16, 2019



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CS can be used with other CS Professional Suite applications or as a stand-alone document storage product. Like all CS Professional Suite applications, FileCabinet CS is available as an on-premise application, a virtual office application hosted by Thomson Reuters, or as a SaaS application.

FileCabinet CS uses an intuitive folder structure and includes a default folder structure which can be used immediately. Templates are also available to use for an individual client or across the board. A global filing structure can also be created in FileCabinet CS during the setup process that allows users to ensure the proper format is followed for any subsequent files or folders created, and users have the option to create sub-folders at any time.

FileCabinet CS allows users to add client notes to any folder stored in the application. There is also an option available that will filter out inactive clients from the client list, making the search process more straight-forward and a Hidden Documents option allows users to remove and archive files not currently being accessed. Documents stored in FileCabinet CS are typically stored in their native format, though users can convert shared documents to a PDF in order to avoid unauthorized changes.

Each document stored in FileCabinet CS can be automatically labeled as it's being stored and the drag and drop feature allows users to move documents into and out of the application as desired. FileCabinet CS can also be used with any TWAIN compliant scanner to scan a variety of documents, which can be saved to the appropriate client folder. Images can also be scanned, with the Image Groups feature providing easy organization of all scanned images.

FileCabinet CS will automatically create new client drawers if one does not already exist, and will automatically index documents for easy document management and retrieval.

Users can search for a folder using a client I.D. number, client name, or a keyword. In

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with documents via secure email, with the option to send a complete file, a document within the file, or even just a single page. All documents can be password protected for additional security if desired.

FileCabinet CS does not offer a client portal, but users can opt to use the NetClient CS portal in order to share documents with clients. Portal access can be custom defined for each client, and users can easily determine exactly what information and documentation they wish to make accessible to each client. NetClient CS Portals are bi-directional, so both firms and clients can easily upload source documents, work papers, images, and completed tax returns. In addition, users can send an email to clients when a document is ready for access in the portal. All documents exchanged in the portal are shared as a PDF to prevent unauthorized changes to the document, and all documents are completely encrypted for added security.

FileCabinet CS users can access a variety of help, support, and product resources directly from the CS Professional Suite Support page. The Help and How-To Center offers access to a variety of resources including a completely searchable knowledgebase, as well as a robust user community. Support videos are available for on-demand access, and both standard and custom training options are available to system users. Product support is available during regular business hours, with support available via telephone, email, chat, or by submitting a support request from the website.

FileCabinet CS offers solid document storage capability for firms of any size, and can be used as a stand-alone application as well as an integrated solution with other CS Professional Suite applications. Those interested in FileCabinet CS can watch a brief video or download a demo to try out prior to purchasing. FileCabinet CS pricing varies, depending on the version purchased as well as number of system users, with pricing available from Thomson Reuters.

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