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FirmFlow, ScanFlow, TaxSort, and RecordFlow.

Mary Girsch-Bock • Sep. 16, 2019



**THOMSON
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management needs, GoFileRoom works best for firms already using or planning to use other CS Professional Suite applications. GoFileRoom is a completely cloud-based application, allowing easy document storage and management from any location.

Specifically designed for accounting and tax professionals, GoFileRoom offers a variety of add-on modules designed to increase product functionality including FirmFlow, ScanFlow, TaxSort, and RecordsFlow.

GoFileRoom's dashboard offers quick access to a list of current clients and an alerts list, where users can click on any alert to access details. Documents can also be added using the dashboard, with a robust search option included. GoFileRoom is completely customizable, with users able to create custom drawers and file structures for any or all internal and client-focused storage as needed. Also included in the application is a Rules Wizard, which allows users to create custom individual or firm-wide notification rules based on specific document or workflow events

New in GoFileRoom is an enhanced Document Browser Search option, which allows users to search multiple drawers simultaneously, use advanced search options, and even customize the document search screen view as desired. Users can also search for documents using keywords within a document, as well as using index fields. Also available is the Quick Launch tool, that allows users to store certain documents on their desktop for quick access. GoFileRoom supports multiple file formats, with all documents stored in their native format. For firms that wish to scan documents, the optional ScanFlow module allows users to scan documents in bulk, with GoFileRoom automatically converting all scanned documents to fully text-searchable PDFs, and then filing them in the appropriate location.

Also new is a robust set of APIs, which allow firms to build custom integration between GoFileRoom and 3rd party applications to automate almost any document

or user activity, as well as document and workflow reporting.

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GoFileRoom includes enterprise level security, including the ability to restrict document viewing and access to specific user groups. Mentioned earlier, users can also password-protect PDFs sent via email to clients. GoFileRoom uses 128-bit encryption and also includes a complete audit trail that logs all activity and action taken for every stored document.

GoFileRoom does not include a portal, but the application does integrate with NetClient CS Portal for firms that wish to share documents with clients, with the portal accessed through a firm's website. All file types can be published to the portal, and are displayed in a read-only state to prevent unauthorized editing of the documents shared. Clients can also upload files via the portal that are automatically filed in GoFileRoom.

GoFileRoom offers a good selection on add-on modules that are designed to integrate with the application, including FirmFlow, which allows firms to create custom workflows for any type of internal or external project and establish standardized processes; ScanFlow, mentioned earlier, that provides users with a way to quickly and accurately scan multiple documents by leveraging barcode and indexing capability; TaxSort, which applies OCR technology to scanned documents, automating and organizing the tax document identification process; and RecordsFlow, which allows users to create document retention policies that allow firms to tag documents for archival and/or destruction. The product also integrates with other Thomson Reuters applications which include AdvanceFlow, UltraTax CS, GoSystem Tax, , Practice Management CS, Accounting CS, Fixed Assets CS, while also providing seamless integration with Microsoft Office applications and additional utilities to automate filing from other vendor applications such as ProSystem *fx* Tax, Lacerte Tax, and others.

Users can access Help resources from any screen in GoFileRoom. Numerous help and

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and making changes, and on the other

Designed to work with other Thomson Reuters applications, GoFileRoom is best suited for accounting firms with complex document storage and management needs. GoFileRoom is available as an online subscription, with pricing available upon request.

2019 Rating 4.75 Stars

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Firm Management

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