

GoFileRoom

Thomson Corp.

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Price: Monthly subscriptions start at \$1,275 per month.

include a quote from a message in a reply and the addition of a Reply Button for one-click replies. Finally, users can switch between drawers from the Search page via a drop-down menu and the new Sticky Fields that allow users to retain their search criteria.

GoFileRoom takes a flexible and modular approach to document management needs and can easily meet the needs of virtually any firm. Though not inexpensive, the system's value is enhanced by a wealth of features and a "Best Practices Guidebook" that covers procedural issues, integration issues and workflow.

Lacerte DMS Version 5.0

Lacerte DMS, a PC-based system whose interface mirrors that of the other Lacerte applications, uses the same file structure for client files. It also offers some capabilities for security, search and backup.

It offers integration with the Lacerte Tax Software and add-ons, including Tax Planner, E-organizer and Trial Balance Utility. Firms can store and retrieve client information electronically and instantly—tax returns, source documents, emails and spreadsheets, from virtually any application, such as Excel, Word and Outlook. In addition, information can be easily edited,

emailed or faxed directly from DMS.

Enhancements in version 5.0 include the ability to drag and drop emails and attachments directly from Outlook. Also, when setting up folder templates for the current tax year, users can cut, copy and paste folders from the prior tax year for faster setup. And performance has been enhanced to reduce time for scanning, storage, retrieval and viewing. This allows quick setup of current year folders for all clients in one easy step.

Lacerte DMS is a simple and economical document management solution with strong appeal for users of Lacerte tax products. The addition of forms recognition capabilities and tighter integration with office applications may well push DMS into broader use among accounting firms seeking an efficient offering in document management.

XCM

XCM is a first-rate workflow management and information automation solution designed by CPAs and features both scalability and economy.

Web-based, it automates the movement of work while electronically tracking each step of the process. Its search and reporting capabilities give partners and administrators an instant view of the status and open items for individual projects, a staff member's workload or

Lacerte DMS Version 5.0

Intuit

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Price: First-time purchase, \$750; Initial license fee, \$600; annual maintenance, \$150. annual maintenance renewal, \$150.

all work firmwide. It is the only Web-based workflow and information automation solution that works either standalone or with any of the leading document management systems.

The software offers full support for multioffice environments, a feature helpful to firms with distributed offices. It also provides customizable due-date monitoring by jurisdiction for project-specific tax classifications. Because it is Web-based, XCM excels at collaboration tasks serving as a centralized infor-

XCM

XCM Solutions

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Price: \$50 per user annually, \$3 per task; Enterprise pricing available.

mation repository for all questions and review comments, one-click advanced search and a full suite of client and management report templates.

Recent notable enhancements include integration with ProSystem fx Document; the addition of workflow capabilities for extensions; new capabilities that allow firms to add budgeting and actual hours to specific tasks; and the automatic scheduling of certain recurring tasks based on time period, type of information to roll over or by staffer assigned to the task.

Though not a complete document management system, XCM handles the complexities of document management prior to archiving. When used as a front-end extension, it provides excellent support at an economical price that should appeal to accounting firms of any size.