

Top 5 Alternatives to FileCabinet CS® for Accounting Firms

Thomson Reuters has officially announced it will stop servicing FileCabinet CS in 2027. That may seem distant, but for accounting firms, it's a tight deadline, especially since busy season takes up a major chunk of your year. The good news? You're not stuck. Today, we're sharing five alternatives to FileCabinet CS. Let's dive in.

Why It's Time to Move on from FileCabinet CS

FileCabinet CS may have been a staple in the accounting world, but its limitations are now too significant to ignore:

- No cloud or mobile access
- Manual document routing
- 100GB storage cap
- End-of-life in 2027
- No client portal

Waiting to make a change could mean rushing into a new system during your busiest season. The sooner you plan your transition, the smoother it will be.

What to Look for in a FileCabinetCS Replacement

You need more than just a place to store PDFs. Today's top alternatives offer:

- Cloud-based access for staff and clients
- eSignature workflows
- Integration with UltraTax CS
- Strong support and training
- Secure, branded client portals
- Compliance and audit trails
- Unlimited storage and guest users
- Mobile access and remote collaboration

The Top 5 FileCabinet CS Alternatives

1. SmartVault

SmartVault is built specifically for accounting and tax pros and was designed to work seamlessly with UltraTax CS. It checks every box when it comes to replacing FileCabinet CS — and then some.

Why SmartVault Stands Out

- Unlimited cloud storage and client capacity
- Direct integration with UltraTax CS that lets you print and auto-route documents
- Secure, modern client portal with custom branding
- Built-in eSignature workflows
- SOC 2 Type 2 Compliant
- Automated folder creation and document routing
- Mobile access, audit trails, and team collaboration tools

You can keep using UltraTax CS and simply replace your outdated DMS and portal tools.

2. GoFileRoom

GoFileRoom is another product in the Thomson Reuters ecosystem. It's a web-based DMS designed for larger firms that need deep compliance and audit features.

Pros

- Cloud-based access
- Audit tracking and advanced permissions
- TR-native integration (for firms staying within the ecosystem)

Cons

- Complex setup and interface
- Higher cost, geared toward enterprise-level practices
- Mixed reviews around customer experience and updates

Best for: Mid-to-large firms already using other TR products and willing to invest in onboarding.

3. Onvio Document Management

Onvio is Thomson Reuters' cloud-based successor to FileCabinet CS, but many firms have voiced concerns.

Pros

- Part of TR's "next-gen" suite
- Cloud-based architecture
- Direct integration with other TR tools

Cons

- Frequent system outages reported
- Interface complexity frustrates users
- Limited customization and workflow flexibility

4. Doc.IT by IRIS



Doc.IT is a document management solution built with accountants in mind. It offers a mix of on-prem and hosted options with decent workflow tools.

Pros

- Designed for accounting workflows
- Decent document storage and version control
- Some client portal functionality

Cons

- On-premise or hybrid setups may not fit remote workflows
- Less modern UI
- Integration with tax software not as seamless

Best for: Firms not fully committed to cloud yet but wanting to modernize incrementally.

5. eFileCabinet (now Revver)

eFileCabinet (recently rebranded as Revver) is a broad DMS used in many industries, including accounting. It provides cloud-based storage with advanced search and automation features.

Pros

- Cloud-based DMS with solid organization tools
- User permissions and templates
- OCR and tagging features

Cons

- Not accounting-specific
- No direct integration with UltraTax CS
- Workflow feels generic compared to vertical-specific tools

Best for: Firms not using UltraTax CS and looking for a general-purpose DMS.

Making the Switch: Final Thoughts

If you're still using FileCabinet CS, the 2027 sunset is your wake-up call... not just to replace your DMS, but to rethink how your firm handles documents, collaborates with clients, and secures sensitive information.

Among these five options, SmartVault is the only purpose-built solution that gives UltraTax CS users a faster, smarter way to:

- Manage and organize tax returns with automated folder structures
- Collect source documents effortlessly through a secure client portal
- Collaborate in real-time with clients and team members — from anywhere

And the best part? You don't have to figure it out alone. SmartVault offers specialized migration services to help FileCabinet CS users transition quickly.

Our onboarding team will work with you to:

- Migrate your documents and configure folder structures
- Train your staff using role-based tracks inside SmartVault Academy
- Customize your workflows for UltraTax CS with SmartRouting
- Set up branded client portals your clients will actually enjoy using

Ready to switch? We make it easy.

Get a more comprehensive approach to data security and document management. Talk to your Rightworks Tech Advisor about bringing SmartVault into your secure cloud environment.

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