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professionals.

Dec. 01, 2008

*From the Aug. 2006 Issue*

The 2006 Tax and Accounting Technology Innovation Awards were announced in June, recognizing recent advances in technologies that benefit accounting and tax professionals. This year's five award winners included long-standing heavyweights in the accounting technology field such as CCH, Intuit and PayCycle; relative newcomer Colligo Networks; and the formidable Microsoft, which recently reintroduced itself to the accounting market.

Winners of the Tax and Accounting Technology Awards are selected by this magazine's editorial advisory board, contributing writers and editorial staff for their innovation as well as for the potential benefits their products or services are likely to deliver to the profession. The advisory board is comprised of accounting and tax professionals from across the country who are engaged in public practice in firms ranging from sole practitioners to major, multi-office regional practices. This year's nominees included software, hardware, services and web-based products geared toward increasing the productivity and profitability of a professional practice, or toward enhancing the relationship between a firm and its clients.

The awards were announced at a reception ceremony at the California Accounting and Business Show & Conference in Los Angeles, and during a lunch general session at the AICPA TECH 2006 conference in Austin, Texas. Executive Editor Gregory L. LaFollette, CPA.CITP presented the awards.

“I am excited by the continued evolution of technologies designed to

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and be either less than two years old or have undergone a significant redevelopment or addition within that timeframe. Products or services previously winning an award are not eligible. All award recipients were selected on an “at-large” basis — there are no categories represented by the winners, nor are the winners ranked against each other. Nominations can be made by any person, including vendor representatives, resellers and end users.

You can jump directly to specific winners:

[CCH Tax & Accounting](#) | [TaxAlmanac.org](#)  
| [Microsoft Small Business Accounting](#)  
[PayCycle Inc.](#) | [Colligo Networks](#)  
| [Honorable Mentions](#)

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**CCH Tax and Accounting** ([www.tax.CCHGroup.com](http://www.tax.CCHGroup.com))

received an award for ProSystem *fx* Scan, formerly known as BOCDIP.

The system is an automated document identification tool that supports the paperless process for accountants, quickly completing what previously were several expensive and time-consuming tasks, freeing professional staff to engage in more profitable activities. The system includes PDFlyer, a powerful and user-friendly Adobe Acrobat plug-in that facilitates working with multiple \*.PDF files in a paperless, dual-screen environment. Together, BOCDIP and PDFlyer provide an extremely efficient system for preparing paperless 1040s.

The CCH ProSystem *fx* Scan paperless process begins when client information arrives at a firm. With minimal preparation, a member of the administrative staff scans the information, and CCH ProSystem *fx* Scan, working completely behind

the scenes, retrieves and processes the information and outputs an identified,

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CCH President and CEO Kevin Robert. "This industry recognition confirms what our customers already benefit from — CCH's commitment to innovation and integration that makes professionals more productive and profitable. We take our responsibility of being a strategic partner to our customers very seriously.

"CCH is focused on ensuring that our customers have best-of-breed integrated workflow solutions that ensure their competitive advantage, and ProSystem *fx* Scan is evidence of that," said Robert. "With the acquisition of this document automation tool and integration into our portfolio of software solutions, including our Tax, Document and Engagement products, we are providing CCH customers with a significant competitive advantage in facilitating their move to a paperless office environment and reaching new levels of productivity."

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**TaxAlmanac.org**, a new web-based research system from Intuit ([www.TaxAlmanac.org](http://www.TaxAlmanac.org)), received an Innovation award because of its use of "Wiki" technology to provide a free interactive tax research portal for professionals. The non-commercial website allows registered users to update and maintain the research content on the site, allowing professionals to assist each other.

Essentially, the site draws on the power of the professional tax and accounting community, leveraging the collective knowledge of professionals everywhere. The content on TaxAlmanac.org is written by tax practitioners and accounting academia from across the country. As of publication, there are 8,653 articles available. The site also includes key information that tax professionals need when conducting research, such as the Internal Revenue Code, Treasury Regulations

and Tax Court Cases, and, unlike research software, the content on the site

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**"TaxAlmanac.org**

is a free online resource for tax preparers, and Intuit has built the site to make it not only an information source but also a unique and thriving community.

"We created TaxAlmanac just over one year ago in response to tax professionals who were unhappy with existing solutions. More than 150,000 users have visited the site, and the feedback has been phenomenal. Innovation has been the foundation of success at Intuit, and it is very rewarding to have our innovation recognized with this award." Intuit recently announced that the free tax research portal now has 10,000 registered users and that an estimated 150,000 tax preparers used TaxAlmanac.org during the 2005 tax year season to glean information and to help keep them compliant on regulatory issues.

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**Microsoft Office Small Business Accounting**

**2006 ([www.microsoft.com/smallbusiness](http://www.microsoft.com/smallbusiness))**

also received an award, showing the potential effect that the world's largest software developer may have on the professional tax and accounting markets. The program, which is geared toward the small business market, offers the ubiquity that only Microsoft can provide, with the look and feel of familiar Microsoft Office software like Outlook and Word, plus the ability to seamlessly integrate with Office programs for contact management, word processing and database and spreadsheet functions. The system is built on the MSDE database engine.

"It is an honor to receive one of The CPA Technology Advisor's 2006 Tax & Accounting Technology Innovation Awards," said Rajat Taneja, General Manager for Small Business at Microsoft Corporation.

The program maintains a comprehensive, full-time audit trail and provides

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www.paycycle.com,  
said Taneja.

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**PayCycle, Inc. ([www.PayCycle.com](http://www.PayCycle.com))**

was honored for its 2006 Wholesale Program for Accounting Professionals, a comprehensive, online client payroll solution available at discounted wholesale pricing. Through the professional accountant version of the online payroll system, accountants can either handle all aspects of the payroll process or provide consulting and compliance services to small business clients who perform most of the process themselves. Either way, the online system maintains the accounting firm's brand at all times and helps to make payroll profitable for accounting professionals by automating the entire process.

The wholesale program costs \$14.99 per client per month for the first five clients and \$9.99 per month for subsequent clients. The monthly fee is all-inclusive. There are no additional per-payday or per-employee charges. Direct deposit services, federal and state electronic tax payments and filings, including W-2's, are also provided at no additional expense. The program even offers toll-free customer service with payroll experts, a benefit rarely found in payroll systems for accounting professionals. PayCycle provides complete payroll form support for all 50 states and offers paperless electronic payments and filings for 19 states. This saves accountants and their staff hours of time calculating and completing state payroll tax form filings.

"PayCycle is honored to win one of The CPA Technology Advisor's Innovation Awards this year," said Jim Heeger, CEO, PayCycle, Inc. "We thank the sponsors for recognizing and celebrating innovation in the accounting

industry. PayCycle is very pleased to be the only payroll solution selected

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adhoc networks with a single button click. Users can then share data and interact with each other using common or corporate applications in a secure and reliable environment, regardless of whether they have access to the Internet or corporate servers.

Colligo increases the productivity of mobile workers by enabling them to act on information when and where it is created. Gone are frustrating data-sharing and communication methods, such as floppy disks, USB key swapping or slow infrared

connections. Workgroups can now confidently Colligo each other with enterprise grade security anywhere. Colligo's patent-pending technology brings core mobility solutions to audit teams that need to interact when in connected, disconnected

(server free) and intermittent modes. Colligo Workgroup Edition 4.0 is deployed by accounting firms in North America, Europe and Asia. Colligo Workgroup Edition 4.0 supports numerous collaboration and engagement platforms, including Lotus Notes, CaseWare, CCH ProSystem fx, and Thomson Creative Solutions.

"We applaud The CPA Technology Advisor's efforts in continuing to recognize technology innovation in the tax and accounting field," said David Wood, Vice President of Sales for Colligo Networks. "We are honored to be recognized for the innovation and practical application of Workgroup Edition. Receiving the 2006 Tax and Accounting Technology award confirms that we've solved a critical challenge to audit teams — extending the use of audit applications into offline settings where team members have no access to the Internet or corporate servers."

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In addition to the above winners of the 2006 Tax &

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manage

and work with a business' books. In addition to not having to install and maintain software, users are able to securely access their data from virtually any location, and the online nature of the system encourages accountant collaboration and eases write-up and reconciliation tasks.

### **BillQuick**

**2006 from BQE Software ([www.BillQuick.com](http://www.BillQuick.com))**

offers a flexible time-based billing and project management system that integrates with all major small business applications including QuickBooks, Peachtree and Microsoft's SBA. The customizable system includes in-depth analysis and business management tools, as well as more than 400 standard invoices and reports that can be edited to meet the needs of any business.

### **Thomson**

**Tax & Accounting's GoFileRoom Version 4.0 ([www.GoFileRoom.com](http://www.GoFileRoom.com))**

provides an organized location for storing and managing all of a professional firm's documents, from client tax documents to financial statements, contracts, and firm and employee data. The system provides a streamlined organization method

that makes data easier to find and simplifies searches, as well as offering added benefit through the ability to add comments and track the review process. GoFileRoom gives your business one place to manage all of your documents, and we do mean all of them: client documents, contracts, financial statements, employee information, you name it. It helps you organize and standardize how every document

is stored and shared. No more frantic searches for the "Smith file."

Now, you can review, add comments and approve documents electronically. You

can securely access your documents from anywhere, and it's easy to learn,

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## Gerke & Associates' BizBench Financial Benchmarking Software

([www.BizBench.com](http://www.BizBench.com)) uses client summary financial data to enable practitioners to produce customized business performance reports for their clients that include performance ratios that quickly identify strengths and weaknesses of clients' businesses. The system also identifies industry percentile rankings and provides scenario planning, peer company comparisons, and calculation of liquidity, efficiency, operating, financing and profitability ratios. The BizBench goal-setting feature uses projected improvement figures to calculate new ratios and rankings if target goals are achieved. The system compares client ratios with median ratios of similar-sized firms in the same industry. □

Advisory • Technology

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