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## help you better serve clients

Do you ever feel confined and limited by your office walls? Do you find that a different environment can sometimes change your perspective? How many times have you found yourself wishing you could be in multiple places at once?

**Kara Haas** • Aug. 09, 2011

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without having a traditional desktop or laptop computer. Many applications are now available as Software as a Service (SaaS) solutions, which are generally accessible through a browser and an internet connection, although even the vendors define SaaS in different ways. These same applications have miniaturized versions that provide access to key features for professionals while they are away from their physical desktops.

CCH, a Wolters Kluwer business (CCH), Thomson Reuters, and Intuit ProLine provide SaaS products that enhance mobility, collaboration and integration. The CCH ProSystem *fx* SaaS Suite is a suite of tools (Tax, Document, Portal, Practice and Workstream) vital to a firm's operation, and can host the data locally, in a secure data center, or some combination of these. Thomson Reuters Tax & Accounting offers many cloud solutions, including GoSystem RS Tax, GoFileRoom and Virtual Office CS. Virtual Office CS is a hosted web portal with the traditional, locally installed CS Professional Suite applications hosted on secure servers. Intuit has a number of browser-based solutions, which include ProLine Tax Online and a forthcoming ProLine Practice Management application.

There is a limited number of true mobile solutions designed for accountants. Research tools are available on the go with CCH's IC Mobile application and the Thomson Reuters Checkpoint iPad application. Intuit and Thomson Reuters have QuickBooks Mobile and Mobile CS, respectively, which extend the reach of popular applications into the on-the-go space. Mobile CS from Thomson Reuters provides access to firm, staff, client and research tools. Users can enter time and expenses, receipts, mileage, and tasks in real time. They can even connect with other professionals in the ARNE Community.

Companies like Capital Confirmation, Inc. have revolutionized the process of audit confirmation requests with an electronic process. The company's [Confirmation.com](http://Confirmation.com)

works to reduce the time exhausted preparing, mailing, requesting and processing

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people could easily access your network and files. A better solution for mobile Wi-Fi users is a portable internet access point called a Mi-Fi, which allows the user to setup a private or secure hot spot, allowing a limited number of users to access Wi-Fi enabled internet devices using a secure connection to the internet over the cellular network.

Mobile devices are flocking the market in the form of smartphones and tablets. Platforms include BlackBerry, Android, and iOS products such as the iPhone, iPod Touch or iPad, to name a few. When selecting devices and applications, it is important to consider platforms and integration. Some applications are device-specific, such as only being available for Mac and iOS products. Others only function on the Windows, Android or Windows Phone platforms.

While many firm applications offer the ability to save and export documents as PDF files, there are still times when paper needs to be transformed into digital format. Vendors like Fujitsu and Canon offer a wide range of scanning devices compatible with multiple platforms. In fact, Fujitsu's [ScanSnap S1100](#) Color Mobile Scanner tucks away into almost any bag and is ideal for on-the-go professionals who need to scan receipts, contracts, plastic cards and more. The scanner offers instant ability to scan items as PDFs and Microsoft Word and Excel documents, or into popular cloud applications like Evernote and Google Docs.

Other essential mobile tools enable practitioners to be more effective in helping clients analyze their financial data. Many SaaS and mobile products function as collaborative tools, where the accountant and client can simultaneously work with transactions and data in a SaaS application, despite the long distances between the two parties. These tools provide users with the benefits of scalability and flexibility as well as the ability to monitor and control how each user works with the product. Clients who are overwhelmed by the many features within their software products



are able to utilize mobile apps built and tailored specifically to their job functions,

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[Xero.com](#), a web-based financial accounting system, has also extended its SaaS solution to the mobile platform, giving partners instant access to the partner dashboard with the opportunity to troubleshoot or analyze data from any device. Users are able to view bank and credit card account balances, prepare and issue invoices, and snap a photo of a receipt to prepare expense reports instantaneously (see image 1).

[Concur Breeze](#), an easy-to-use online employee expense management tool, makes it possible for users to create, update, approve and pay expense reports using any Apple iOS or Google Android phone. As with Xero, receipts can be downloaded from your financial institution or scanned with your mobile device's built-in camera. The information captured on the mobile application is automatically updated in the Concur website. There is no need to tape down and scan pages of thermal receipts, enter them into Excel, and then have another employee type them into your accounting software. With the Concur mobile app, the data is keyed in once, imported directly into accounting software, and can be filed in Breeze or exported to the company's digital document management system as a PDF file.

Recent improvements to the Intuit Partner Platform (IPP) bring a more heavily populated [Intuit App Center](#), which is a marketplace for third-party, on-demand add-ins for the popular QuickBooks small business accounting software. Business owners can find apps that work with QuickBooks and satisfy extended needs in their business beyond financial tasks provided in the accounting software. The Center provides a wide range of SaaS applications that extend QuickBooks to meet specialized needs such as expense reporting, e-Commerce, time tracking, cash flow management and marketing.

Another vendor in the SaaS accounting space is [Intacct](#), which offers an accounting suite designed for medium-sized and public companies, as well as an accountant edition for tax and accounting firms. The Intacct financial management and

accounting system provides a modularized suite of products to cover time and

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exploring additional tools built for industry-specific needs.

Developments in the payment industry have brought additional payment options to small business owners who are on the go. [Square](#) and [Intuit GoPayment](#) streamline credit card processing from smartphones or the iPad. Charlie Russell, founder of CCRSoftware, offers a detailed look at [Intuit GoPayment on the iPad2](#), which is worth investigating (see image 2).

[Dwolla](#) takes the paperless concept one step further, offering the ability to pay vendors or accept payments utilizing electronic transfers (neither cash nor credit cards are required). Users can quickly identify merchants that accept Dwolla using the vendor's Spots feature.

If you're not quite ready to fully immerse yourself or your firm in mobile and SaaS solutions, you're in good company. Many firms find that they still need access to features that reside in their desktop products. Companies like [CPAASP/Insynq](#), [Right Networks](#), [Awensa](#) and [Cloud9 Real Time](#) are helping to bridge the gap that exists between desktop, SaaS and mobile applications. These companies host almost any computer application in a secure server farm. One hosting provider, [Insynq](#), offers the ability to host more than 300 applications, including tax preparation software, financial accounting software, and even Microsoft Office.

Vendors in the mobile tax and accounting marketplace realize that security is a concern for everyone. You will want to ask questions and review documentation and third-party reports to become comfortable with each vendor's approach to security and business continuity. Some areas for evaluation include data center operations (SAS 70/SSAE 16 reports and compliance), industry-specific compliance requirements (e.g. HIPAA, GLB, IRC §7216), safeguards that prevent Denial of Service (DoS) attacks, the physical security of the servers, backup systems, support and response times.

The introduction of apps for smartphones, hosting platforms and SaaS solutions has

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