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The screenshot shows the LedgerDocs website. At the top, there's a navigation bar with links for Home, Tour, Signup, FAQs, and Company, along with a Login button. A banner at the top right says 'Call Toll Free 1-855-998-3041' and 'Or contact us via email'. The main content area is titled 'Benefits' with the subtitle 'Powerful document sharing for Bookkeepers, Accountants & Businesses'. A red button says 'Try it for FREE'. Below this, there's a section titled 'Accountant & bookkeeper benefits' with a list of features: 'Flexible and customizable filing structure to meet your needs', 'Powerful advanced search features finds your records with ease', and 'Secure sharing with your clients as well as co-workers and employees'. To the right, there's a 'What's Next?' section with links for 'Start FREE Trial', 'FAQ's', and 'Call 1-855-998-3041'. At the bottom right, there's a large 'AppAppeal' logo with the tagline 'Helping the world work better'.

Document management has come a long way over the past decade, at least for accounting firms. Although professionals often proudly wear their self-proclaimed skepticism of some technology, most firms are actually quite advanced, at least when comparing technology adoption to their small business clients.

Unfortunately, in the new practice model and new economy, clients who are dragging their feet can also slow down the productivity of a firm. That's where a somewhat new company called LedgerDocs thinks they can help. The company,

founded by an accountant in public practice, recently debuted LedgerDocs.com,

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files. The system can be used to then keep the documents stored in completely customizable file structures, or firm users can move them to other file storage systems. Professionals can also upload financial statements, documents, returns, data files or other items to the client. The system supports virtually any kind of files, including PDFs, images, Word documents and spreadsheets.

For mobile users at either the firm or client, apps are available for Apple, Android and Blackberry phones and tablets. LedgerDocs president Wayne Zielke, CA, says this makes it much easier for some small business users to get into a routine of sending important files to their accountant. The firm administrator has control over user rights access both at the practice and at the client, allowing segregation of what some employees have access to, compared to others.

“Instead of a client coming in with a box of unorganized receipts at the end of the month, he or she can simply take a picture of a receipt or invoice with their smartphone and instantly upload it into LedgerDocs,” he said.

“Taking care of these documents immediately helps prevent them from losing or forgetting them, improving the overall accuracy of the data they provide their accountant.” Users can also email electronic files or scan them directly into the system. Another feature in LedgerDocs is the ability to include notes and add tags, either through the web interface or the app.

Since emailing sensitive client documents is a big risk and many states have enacted laws with stiff penalties for sending unsecured client data, portals like LedgerDocs offer a much safer alternative that meets encryption requirements. All data stored in the system is also automatically backed up by the company.

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