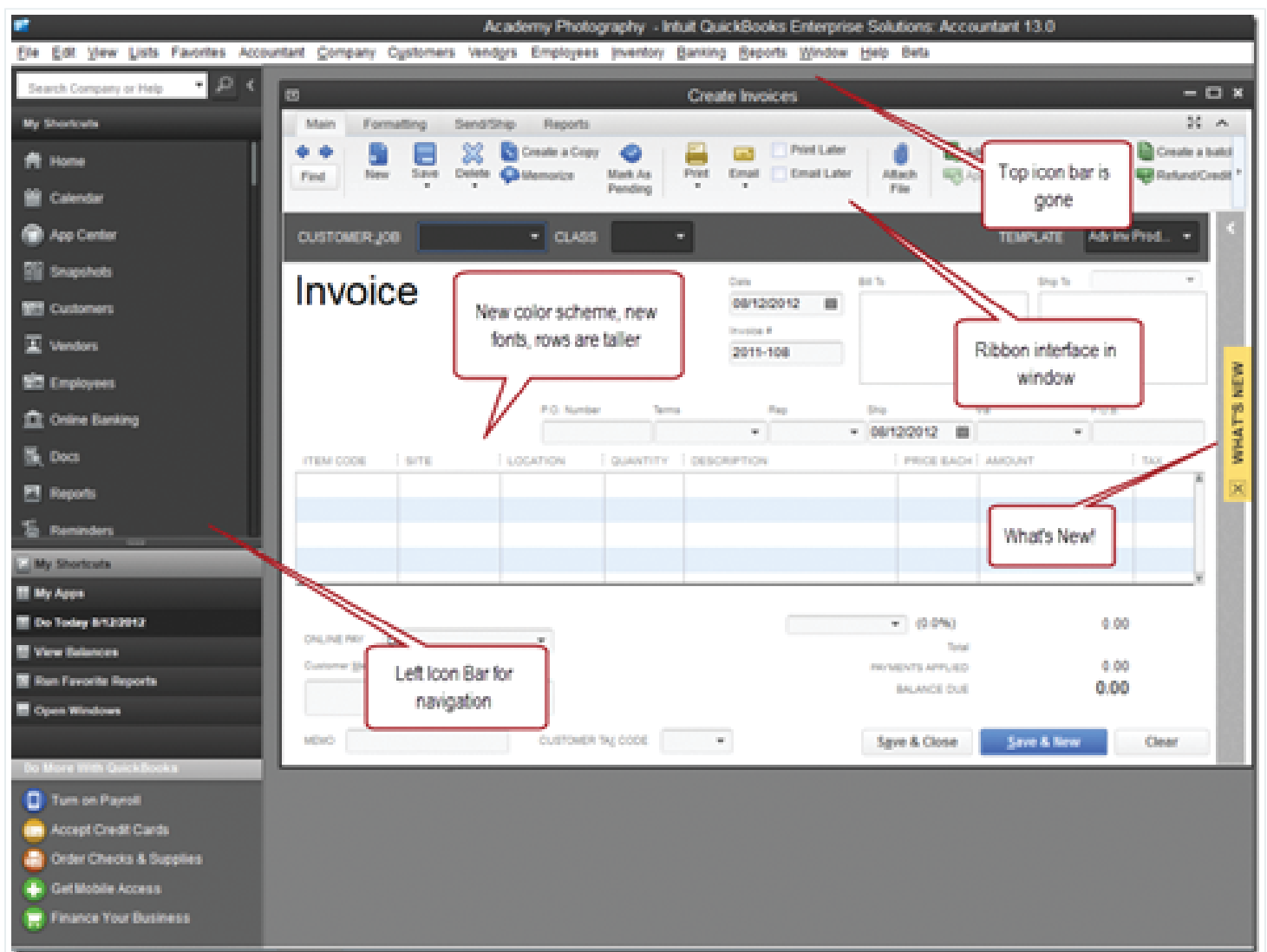


Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

clients.

Doug Sleeter • Dec. 18, 2012



2012 was quite a year for the “maturing” of new world technologies in small business accounting, but to be clear, the “new world” is still in the future for most firms and clients. If you’re trying to straddle both worlds, you still have to keep abreast of products used by current clients while looking ahead to navigate your firm to success.

It's not that there is anything wrong with this old world, except the old-world

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

[depth articles on QuickBooks 2013.](#)

The most significant changes in QuickBooks 2013 include a completely redesigned interface, including new layouts, ribbons, customizable toolbars, a new color scheme, and several new features in the customer and vendor lists. Also, the QuickBooks Accountant version now allows accountants to electronically “send” journal entries to clients and import batches of data from Excel.

Overall, QuickBooks 2013 is a great improvement, not so much for the features, but for the new design that presents a consistent look and feel across the whole product. For people familiar with previous versions, there will be some adjusting to do at first, but in the long run, we believe those users will adapt and even prefer the new interface.

So, as QuickBooks Desktop editions (including Pro, Premier, Accountant, and Enterprise), continue to dominate today's marketplace, the new world is drawing more attention of small business every day. Intuit sees this reality and is making even larger investments in the growing popularity of QuickBooks Online. At the same time, relatively new companies such as Xero are quickly grabbing new customers at the low end of the market, and building an impressive reputation in the global accounting community.

For some entertaining reading on the journey into the new world, check out the recent post by my good friend Chuck Vigeant. In his post, [Election Results and the Pro-Advisor Community](#), Chuck pontificates about how the Intuit ProAdvisor community, Cloud Computing, and the change demographics of the US Electorate are intertwined in interesting ways. He talks about the emergences of “The New Entrepreneur,” who has a much shorter-term focus on building a business than in previous generations.

Anyway, on to the new world....

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

- Would you invest in a large client reception area? If you do, is it because you assume your clients will bring in their records, meet you in person, and pick up their printed financial statements and tax returns?

I find it amazing how many of my answers to the questions above are different today than they were even five years ago.

The firm that is just starting out has a many advantages over established firms because there are no legacy systems and processes to maintain or support. So those of us who do have legacy systems should urgently focus on how we can upgrade our practices and processes to thrive in the new world.

Although you may not be able to start all over again, here are 10 things that will help you in the new world of Internet, mobile, and collaborative client accounting.

1. Go [Paperless](#) and get your clients paperless.

My fellow columnist, Randy Johnston and Dr. Bob Spencer run a web site called www.totallypaperless.com that is filled with education and recommendations for taking your firm and your clients to a paperless environment.

2. Use online meetings with clients including recording client consulting sessions. [GoToMeeting.com](#), [Google+ Hangouts](#).

Online meetings will dramatically enhance the client/accountant relationship. If you're not doing them yet, make it a priority to begin meeting with your clients using these technologies.

3. Get your clients' QuickBooks [hosted](#), or convert them to an online accounting program such as [QuickBooks Online](#), [Xero](#), [Wave Accounting](#) or [Intacct](#).

The key is to get the client's data centralized in a secure cloud-based data

center, where both accountant and client can have anytime/anywhere

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

you to securely share documents and collaboratively edit their contents.

5. Using [Dropbox](#), [Box.com](#), [Skydrive](#), [Sharefile](#), or [Google Drive](#) to share files with colleagues and clients.

For secure transfer of documents between multiple computers, or between colleagues, these tools provide incredible value. Stop attaching documents to emails, and start using one of these sharing services.

6. Use [OneNote](#) or Evernote to organize all of those bits of important information that you need to remember.

OneNote, which is included with Microsoft Office provides an electronic notebook that can be shared among all users within your network. You can use it with your on-premises windows servers, or use [Office 365](#) to centralize your data in the cloud. Evernote is a similar product preferred by many users who do not “live” in the Microsoft Office world.

7. Use [Bill.com](#) to take AR, AP, and Cash Forecasting to the cloud.

Bill.com completely streamlines your AP, AR, and Cash Management processes in a secure, paperless, cloud environment. No matter what type of business you're in, Bill.com will dramatically improve your processes, improve internal controls, and reduce costs for paying vendors and receiving payments from customers.

8. Learn what CRM and project management tools are going to help you in your practice. [Method CRM](#), [Results CRM](#), [Zoho CRM](#).

CRM should be at the center of every business. Use CRM to track and nurture customer relationships.

9. Using [LiveScribe](#) to produce full reports of client meetings including audio recording of the conversations.

The LiveScribe pen is an amazing tool for recording meeting notes,

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved