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Technology has changed rather dramatically since we started the Readers Choice Awards seven years ago, and certainly since this publication was initially started in 1991. Perhaps not as dramatic as the invention of the printing press, but when it comes to workflow processes and always-available access to personal and client data, there has been a significant transition.

In 2006, the first year of the Awards, there was no iPhone. iPad or tablet? Not a chance. The word smartphone wasn't in our vocabulary. Most software was designed to be installed on a firm's file server or desktop computers. For tax and accounting professionals, paperless was the "next big thing."

Fast forward, and it seems like everybody has a smartphone or tablet or both, in addition to their laptop or ultrabook. Almost every software program is being designed in a version for the web, or only for the web. Online collaboration is the norm. Paperless is now only a component of the broader picture of firm workflow and automation.

Those are but a few of the changes that have affected the profession, and they've all been chronicled in our yearly survey, where we give readers the chance to tell everybody else which technologies, services and companies they love and trust. Whether programs that help them provide service to clients, or tools for running back office functions in their firm. The Awards voting is not scientific, but just a snapshot of a product or vendor's popularity.

Technology and vendors succeed in these awards by helping firms and small businesses in real-work situations, helping professionals be more productive, efficient and profitable. With 2013 about to get underway, and the 2012 tax season a few weeks after that, now's a good time to do a more measured assessment of your own practice and technologies by taking the free Productivity Survey

([www.CPAPracticeAdvisor.com/productivity](http://www.CPAPracticeAdvisor.com/productivity)). It helps measure a firm's workflow

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## IN-FIRM TECHNOLOGIES

### Federal/State Income Tax Compliance

**Insight:** Drake Software has led this category every year that we've had the Readers Choice Awards. Although their all-inclusive professional tax system holds about 10% of the overall market, it has a loyal base of users who often commend the company's service, the program's ease-of-use and its everything-included package. Thomson Reuters received the second highest number of votes this year, followed by Intuit ProSeries, CCH ProSystem fx Tax and Intuit Lacerte. Rounding out the top vote recipients were CCH Small Firm Services ATX and TaxWise, and the TaxWorks program.

### PIE CHART?

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Red Gear Technologies TaxWorks 4

CCH TaxWise 3.5

Others: 8

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## Specialty Systems & Tax Prep Tools

**Insight:** Sometimes professionals want a utility or program that's designed for a specific tax-related issue that either can't be handled by their tax system, or that can be better managed with a specialty program. This year's winner, SurePrep, is used in conjunction with many tax systems to provide tax document and workflow automation. Number two on the list, Beyond415 is designed for managing IRS notices.

Bar Chart?

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## Tax Planning Systems

**Insight:** Many professionals offer proactive tax planning services to their 1040 clients, and while tax preparation programs can offer basic planning options, more advanced features are found in systems that are often an add-on to their tax package. These provide planning capabilities for up to decades, in some cases, with all future planned phase-ins and phase-outs, financial ratios and other tools. As with the tax preparation systems, Drake Software received the most votes because of its loyal customers.

## Pie Chart?

Drake Tax Planner 35%

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PPC Individual & Business Tax Planning Libraries 5

RedGear TaxWorks Tax Planner 4.5

Tax Coach 2

Others: 5

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## Tax & Accounting Research Systems

**Insight:** It seems that major tax law changes come into effect, or phase-out, every year. Professional research systems are a necessity for virtually all firms, particularly those with more complex clients. New at the top of this year's list is "TheTaxBook,"

which is available in print and online. It was followed by Thomson Reuters' research

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## Pie Chart?

Tax Materials Inc – TheTaxBook 27%

Thomson Reuters Checkpoint & QuickFinder 25.5

CCH IntelliConnect, TRN & ARM 13.5

Intuit Tax Research & TaxAlmanac 12

PPC Federal Tax Compliance 6.5

CFS Tax Research 4

Bloomberg BNA Financial Accounting Resource Ctr. 3.5

Tax Analysts 2

Lexis Nexis 1.5

Tax Analysts 1.5

Others 3%

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wealth transitions. Whether they do so individually, or in conjunction with a tax attorney, these services are integral to reducing tax liability through strategic planning. This is a small specialty service within the accounting profession, and that is reflected in this year's voting, with only about 20 percent of readers selecting a preference.

#### **Chart:**

Thomson Reuters ONESOURCE 30%

Bloomberg BNA Estate Planner & Gift Tax Planner 25

CCH ViewPlan Advanced 20

Thomson-West Intuitive Estate Planner 15.5

Others Combined 9.5

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system, followed by Avalara's AvaTax 1099, CFS Tax Software and the Payroll Compliance and Reporting solutions for ATX and TaxWise.

## Chart

AMS 1099-Etc 55%

Avalara AvaTax 1099 17%

CFS Tax Software 11%

CCH ATX& TaxWise Payroll Compliance 4

Greatland Complete W-2 & 1099 Reporting 3.5

1099 Express & W-2 Express 3.5

Accountants World 3.0

Others Combined 3.0



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criminally for not collecting and remitting sales taxes. Sometimes they don't know they have an obligation in certain areas, other times they simply misunderstand or incorrectly make their filings. With states pinching pennies and leaving no stone unturned to look for income, the result of errors isn't worth it. While simple, single-location businesses often can get by using their state's tax reporting website, companies with high volumes and/or sales in multiple jurisdictions absolutely need a more automated solution. And for firms that serve multiple clients, a system that streamlines these functions across multiple entities is a must. This year, Vertex and two Avalara systems top the list of programs for sales and use tax reporting, followed by the websites of state agencies, eFileSalesTax.com and CFS Tax Software.

#### **Chart:**

Vertex Indirect Tax 36%

Avalara Avatax 18%

Individual State Agency Websites 16%

Avalara Trustfile 13%

eFileSalesTax 7%

CFS Tax Software 5.5%

Others Combined 4.5%

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## Sales & Use Tax Exemption Certificate Management

**Insight:** For businesses dealing in sales to tax exempt entities, reporting is still a necessity, as is managing and maintaining copies of their exemption certificates. While these programs aren't as widely used or recommended by accounting professionals, business in some industries rely on them to keep their reporting organized and automated. As with last year, Avalara's AvaTax Certs was the clear favorite, with systems from Thomson Reuters and Vertex following.

### Chart:

Avalara – AvaTax Certs 65%

Thomson Reuters – ONESource Exemption Certificate Mgmt. 22%

Vertex Inc. – Exemption Certificate Manager 9%

Others 4

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recurring transactions, after-the-fact payroll and financial reporting... These are the core functions of write-up, and they aren't going away. Strong multi-client write-up systems are still a staple in professional accounting firms, with most practices using Accountant version of QuickBooks, whether because they favor it or because most of their clients are using other versions of QuickBooks, which makes data transfer generally simple. However, there are still many alternatives on the market. Following QuickBooks this year are Thomson Reuters and PC Software Accounting Inc..

### Chart:

Intuit QuickBooks Accountant 57%

Thomson Reuters Accounting CS 18

PCSAI Client Write-Up 17

Others Combined 8

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TaxWise Trial Balance systems following

### Chart:

Thomson Reuters Trial Balance CS 61%

CCH ProSystem *fx* Trial Balance 19.5

CCH Small Firm Service ATX & TaxWise 15

Others 4.5

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managerial insight, and stricter controls. In this year's voting, Thomson Reuters was again the favorite, followed by systems from CCH and CaseWare.

#### Chart:

Thomson Reuters Engagement CS 49%

CCH ProSystemfx Engagement 29

CaseWare Working Papers 12

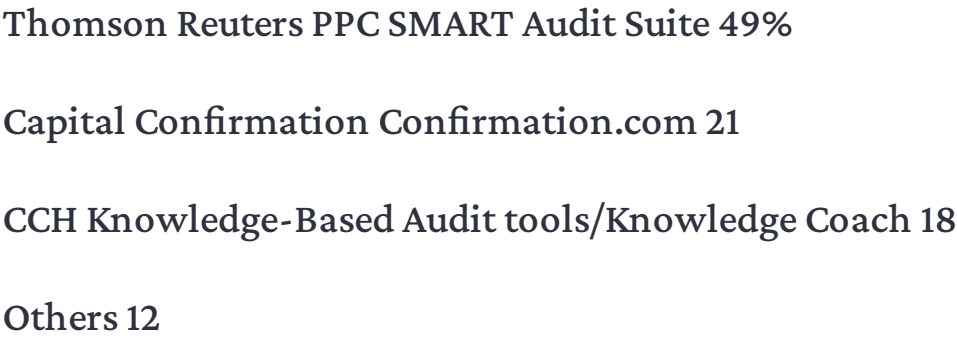
Others: 10

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Chart:



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Powered by ADP.

### Chart:

AMS 1099-Etc A-T-F Payroll 11%

QuickBooks Payroll Enhanced for Accounting Professionals 22

Thomson Reuters Accounting CS Payroll 9

Intuit Online Payroll 7.5

PayChex 6

ADP RUN Powered by ADP Payroll for Accountants 5

Others Combined 9.5



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particularly financial reporting, cash flow management, business planning and benchmarking. In this year's voting, readers selected Thomson Reuters Financial Analysis CS as number one, followed by Sageworks ProfitCents, Sage Business Intelligence and Active Planner, CCH ProSystem fx Profit Driver and Tableau Software's business intelligence solution.

#### **Chart:**

Thomson Reuters Financial Analysis CS 36

SageWorks ProfitCents 26

Sage Business Intelligence and Active Planner 17.5

CCH ProSystem fx Profit Driver 9

Tableau Software 6

Others Combined 5.5

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**Insight:** Knowing the proper value of a business is especially important when planning on sales, transfers or other transitions, and sometimes when a client is involved in litigation. While this is a smaller specialty service offered by a smaller set of professionals, it is one that still requires advanced systems to help manage all of the potential variables in determining accurate values.

#### **Chart:**

Thomson Reuters PPC Business Valuation Specialist 39.5%

ValuSource Express Business Valuation 22

NACVA Business Valuation Manager Pro 16.5

MoneySoft DealSense Plus+ & Corp. Valuation Professional 13.5

Others: 8.5

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which generally are geared toward invoicing and AR management in professional firms. Thomson Reuters' Practice CS was the leader in this category this year, followed by CCH's ProSystem fx Practice Management, AccountantsWorld's Practice Relief, Commercial Logic's APS and CaseWare.

Thomson Reuters Practice CS 42

CCH ProSystem fx Practice Management 33

AccountantsWorld Practice Relief 12.5

Commercial Logic APS 4

CaseWare 3.5

Others 5

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## **Practice Management / Time & Billing**

BQE BillQuick 29

Timeslips 25.5

OfficeTools Pro 19.5

ImagineTime 12

TPS Software 7.5

All Others Combined 6.5

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## Time Tracking & Attendance Tools

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### Chart:

QuickBooks Time Tracker 63%

SwipeClock 17

WaspTime 8

Chrometa 4.5

B2Bee 2.5

Other Misc Products: 5

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## Online Invoicing/Bill Payment Solutions

**Insight:** Many small and mid-sized businesses, and accounting firms, are adopting

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**Chart:**

Bill.com 33.5%

Intuit Payments 33.5%

Sage Billing Boss 11%

Freshbooks 7.5%

Xero 6%

Bill & Pay 2.5%

Others 6%

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banking and transactions, portals are increasingly a competitive requirement for professional firms. Clients can access and upload or download documents, allowing them “visit” you on their schedule. It’s also a much safer alternative than unsecured email. In this year’s voting, Thomson Reuters’ NetClient CS Portals took the most votes, followed by eFileCabinet, ShareFile and CCH’s ProSystem fx Client Portals.

#### Chart:

Thomson Reuters NetClient CS Portals 29%

eFileCabinet Secure Drawer 16

ShareFile 13.5

CCH ProSystem *fx* Client Portals 12

Intuit Document Exchange 7.5

Microsoft SharePoint 7.5

AccountantsWorld CyberCabinet

SmartVault 4.5

All Others Combined: 4

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## Document Management & Document Storage

**Insight:** Once again, this category was the largest in this year's Readers Choice Awards voting, with 47 products represented. They range from simple file folder programs, to systems designed for large enterprises with options for managing retention, client collaboration functions and automated workflow. The top vote-getter was the Drake Document Manager, which is included in Drake Software's Tax system, and voters are always supportive of the program and the company. Following it were systems from Thomson Reuters, Intuit, eFileCabinet, TaxWorks, SmartVault, CCH and AccountantsWorld.

### Chart:

Drake Document Manager 32%

Thomson Reuters FileCabinet CS & GoFileRoom 23

Intuit ProSeries & Lacerte 10.5

eFileCabinet 9.5



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## Document Management Utilities

**Insight:** There's more to paperless than just managing documents, and therefore there's a market for additional tools and apps that help with other workflow processes. These often include hardware, specifically scanners. Once again this year, Fujitsu reigned over the voting in this category, followed by HP, Canon and the Tic-Tie-Calculate program.

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Nuance 7

Kofax 6.5

Others 1.5

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## Tax Document Automation

**Insight:** For tax engagements, the biggest technological shift is in getting client source documents digitized as early as possible, where they can be organized into electronic workpapers and the data can be extracted and automatically put onto a client's return. Time saved equals more clients, which equals more revenue... a no-brainer for tech-savvy practices. Of voters selecting a preference this year, Intuit's Tax Import for Lacerte & ProSeries was once again the leader, followed by systems from SurePrep, Thomson Reuters, CCH and GruntWorx.

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CCH ProSystem *fx* Scan 10

Coppanion/Drake GruntWorx 7.5

CCH Small Firm Services ATX & TaxWise PaperlessPLUS 6

Others 3

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## Workflow Management Systems

**Insight:** What exactly is workflow? Well, every firm has a different definition and model, but there are best practices and workflow systems are designed to help ensure that they are followed, while still following specific firm standards, and streamlining all kinds of engagements. We've divided this into two groups: Comprehensive, End-to-End Workflow, which is designed for larger practices; and Other Workflow Tools, which are designed for aiding in specific tasks and engagements.

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Thomson Reuters FirmFlow 18

CCH ProSystem *fx* Workstream 17

Autonomy iManage 4.5

Others 3.5 1

### **Other Workflow Tools Chart:**

eFileCabinet 25%

Thomson Reuters Practice CS & GoFileRoom 16.5

Drake Software Document Manager 16

Intuit Lacerte & ProSeries DMS 12

Bill.com 10

Treeno 8

CCH ProSystem *fx* Scan and *fx* Document 7.5

Others combined 5

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**Insight:** If you don't build it, someone else will... and potential clients will see that firm instead of yours. Whether you are actively seeking new clients or not, a firm's website is an essential and generally inexpensive tool for keeping your brand out there. Emochilla, recently acquired by Thomson Reuters, led this year's voting, followed by the loyal Drake users and RootWorks, which offers website services along with business consulting to CPA practices.

#### **Chart:**

Emochila Websites for Accountants 23

Drake 1040.com Preparer Sites 19.5

RootWorks 16

Service2Client CPA Websites 8.5

CCH ProSystem fx SiteBuilder 6.5

Intuit Websites 6

GetNetSet 6

AccountantsWorld Website Relief 5

CPASite Solutions 4.5

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## CLIENT SIDE ACCOUNTING SYSTEMS

**Insight:** As professionals know quite well, their business clients often seek their advice for more than just bookkeeping, write-up, payroll and tax services. These entrepreneurs ask for recommendations on other aspects of their business, from managing growth, helping trim waste, planning for expansion and many other areas. And when it comes to what technologies they should use to run their business, especially their bookkeeping, they most frequently ask their professional accountant.

In this year's voting on technologies for small businesses, the tax and accounting professionals who read our publication once again overwhelmingly chose various QuickBooks versions for different types of client verticals. This isn't because the professionals are benefitting directly, but the choice of program that clients use does affect the firm, mostly through simplified data transfer. If most clients are on the same system, it also makes it simpler to support them during write-up and other services.

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(see last year's online and print versions).]

## **Small Business Accounting – Installed Programs**

### **Chart:**

Intuit QuickBooks Simple Start, Pro or Premier 62%

Sage 50, 100 or 300 – 11.5%

AccountantsWorld 7

A-Systems 5.5

Cougar Mountain 5

CheckMark 4

MYOB 3.5

Others 1.5

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QuickBooks Online 62%

Thomson Reuters Client CS 10.5

Sage One 6.5

NetSuite 6

Xero 5

Freshbooks 3.5

Intacct 3

Others 3.5



**Chart:**

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ISS Construction Manager 3

Others Combined 6.5

**Retail Accounting/Point-of-Sale**

**Chart:**

Intuit QuickBooks Point-of-Sale 65%

Wasp Barcode QuickStore POS 10.5%

Microsoft Dynamics POS 9

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## Not-for-Profit Accounting

### Chart:

Intuit QuickBooks Premier: Nonprofit Edition 65%

Sage Nonprofit Solutions 14.5%

Epicor for Non-Profit 7.5

Blackbaud Financial Edge & FundWare 6

Serenic Navigator 3.5%

Others Combined 3.5%

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## QuickBooks/Small Business Paperless Add-Ons

### Chart:

Bill.com 51%

SmartVault 25%

Papersave.com 6%

Personable Inc. 5.5

Cabinet NG 4.5%

Others 8%

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Sage Fixed Assets 10.5%

Pro-Ware Asset Keeper 6.5%

BNA Software BNA Fixed Assets 4.5%

CCH ProSystem *fx* Fixed Assets 4%

CCH SFS TaxWise & ATX Fixed Assets 3.5

Others Combined 6.5

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End of Group of Charts

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## GENERAL BUSINESS TECHNOLOGIES

### ASP/Hosted Solution Providers

**Insight:** Virtually every software program that a business or accounting firm uses can be turned into a web-based system simply by having it hosted by an Application Service Provider (ASP). This lets users continue to work in the program they are used to, while also relieving them of the headaches of IT functions and program updates.

#### Chart:

Right Networks 47

Cloud9RealTime 28

CPAASP/InsynQ 9.5

Awensa 5.5

Real Time Data Services 4

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## Outsourced Technology Services

**Insight:** Just as many firms partner with a local legal practice or other professionals for certain areas of client work, many are starting to use the services of other companies that specialize in handling certain areas of practice functions. These providers range from ASPs to virtual servers, digital fax systems, email management and even tax form preparation.

### Chart:

Right Networks 30

eFax 27

CPA2Biz Email Solutions 13.5

CPAASP/InsynQ 9.5

Network Management Group 6.5

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## Laptop and Desktop Computers

**Insight:** What brand of computer do our readers prefer? Dell holds the lead again, with HP following and Apple moving into third.

### Chart:

Dell 35

HP 21

Apple 10.5

Toshiba 10

Lenovo 6

Compaq 5

Gateway 4.5

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## Smart Phone

**Insight:** The rise and fall of the BlackBerry has definitely been shown over the years of our Readers Choice Awards. From being in a strong first place only a few years ago, the brand has now fallen to a distant third, behind the king iPhone and Android devices.

## Chart:

Apple 42.5

Droid 37



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## Tablet Computers/Devices

**Insight:** Tablets started out as mostly fun entertainment devices, but they have quickly become a light-duty replacement for some laptops, providing work applications and mobile access to professional data without having to squint at a smart phone screen. The iPad continues to rule here, as well, but several other brands are strong with our readers.

## Chart:

Apple 56

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## Printers & Scanners

**Insight:** These devices are integral to all firms, especially as they continue to digitize and take everything paperless.

HP 41%

Brother 15

Fujitsu 12.5

Canon 9.5

Dell 7

Xerox 4.5

Epson 3.5

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## Office Supply Store

**Insight:** Sometimes we shop for office supplies online, but most small businesses and accounting firms still shop in physical stores.

### Chart:

Staples 26

Office Depot 21

Office Max 13

Costco 11

Sam's 9

Quill 8.5

BestBuy 8

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## OUT-OF-OFFICE

### Favorite Form of Physical Exercise

**Insight:** Everybody's more mobile it seems, or at least have more options for remotely accessing work and entertainment via phones and tablets. Yet, as mobile as we are, speaking personally at least, I don't seem to get the exercise I know I should. Our readers seem to agree.

#### Chart:

- 1) Who has time to exercise?
- 2) Jogging/Running
- 3) Aerobics
- 4) Weightlifting
- 5) Jumping to Conclusions

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## **New Technologies for Professional Firms**

**Do you use smartphone or tablet apps designed specifically for tax and accounting professionals?**

Yes 16.26

No 83.74

**How “remote” are you? How many hours per week do you work on client engagements or firm business while away from the office (at a client, at home or anywhere else)?**

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Between 13-16 hours: 4%

More than 17 hours: 9%

1 36

4 28

8 16

12 7

16 4

17 9

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New Question:

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Technology continues to shape the modern tax and accounting professional, and certainly is helping firms be more productive and profitable, as they can get more done and serve more clients, on more profitable engagements.

Thank you to the more than 2,000 voters who took the time to share their views in the 2013 Readers Choice Awards. As always, let us know if there are any additional programs or technologies you think would be a fit for the awards.

Here's to a successful new year in 2013!

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