From the **April 2013 review of portal systems**.

Although our review is focused on solutions which are separate from the other applications used by an organization, there are some solutions which offer portals as an integrated add-on feature. We excluded these from our traditional review, but these tools should be considered for those who use (or are considering) the related options.

The three add-ons are all related to tools that are primarily designed to provide document management and/or workflow management to a firm. They are:

- Doc-It Portals
- Office Tools Professional Client Portal
- XCM*portal*

Doc-IT Portal

Doc-It is a well-regarded document management system for small and mid-sized accounting firms. The Doc-It Suite is made up of the Work Binder application for managing engagements, the Archive for storing completed engagements in their final PDF form, and the Doc-It Portal for sending and receiving files from clients and others outside the firm.

Unlike every other product evaluated as part of this review, Doc-IT is the only one which can be hosted on a firms internal servers or hosted by a third party. For more information on the Doc-It Suite, visit www.doc-it.net.

Office Tools Professional Client Portal

Office Tools Professional is a popular practice management application for small and

XCM*portal*

XCM*portal* is a service which is designed to assist firms and clients with collaboration by providing a secure website where they can request and receive documents. Staff can post lists of missing items or open questions to the portal for a client, and the client can respond securely in writing using the secure portal platform. For more information, visit www.xcmsolutions.com.

Firm Management

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