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## Overview

CPA Site Solutions is an integrated marketing and website hosting platform for CPA firms. The company provides hundreds of site templates with a simple and easy to use web-based interface for editing the site and menu structure. The interface is fairly easy to use, and is similar to a simplified interface for the Joomla web content management system. The site map can be modified using drag and drop, and while the interface is adequate for novice users, some advanced options require the intervention of technical support. Firms can receive commissions for click-through

sales of QuickBooks, items on Amazon.com, and can receive payments from clients

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responsive.

The included client portal solution provides an effective web-based portal which is a base of operation for a firm's interaction with clients. Available services include secure file exchange, access to hosted accounting software from Cloud9 Real Time, online payroll from Intuit, and an online tax organizer. Firms can also opt to host all of the firm's applications (including tax software) with Cloud9, in which case the client portal can also serve as a portal for remote staff.

New financial calculators have been added, and the existing calculators were rewritten to operate on most smartphones and tablets. A total of 130 financial calculators are available to all subscribers, and can be used from either the website or the client portal home page.

The application has a number of guides to help new users, and includes both online help as well as videos to explain how features work from within the product. Users can access tutorials on everything from e-mail signature blocks to search engine optimization tips through the site. Support is US-based, and is available 60 hours per week via telephone or live chat, and 24 hours a day via e-mail.

## **Summary and Pricing**

Pricing is based on three tiers (\$49.50/mo for Silver, \$69.50/mo for Gold, and \$99.50 for Platinum), and the first 60 days are free on all plans. Each tier requires an initial one year commitment. The base Silver service includes content and hosting, but does not include ongoing maintenance. Gold service includes content, hosting, and adds two hours of monthly site maintenance. Platinum service includes advanced search engine optimization services, setup of separate pay per click (PPC) campaigns, and configuration of Google Analytics.

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added this year alone) which can be edited in a simple web interface or firms can select the optional custom template design service.

- Includes integrations with hosted accounting applications from Cloud9 Real Time and Intuit Online Payroll, as well as an online tax organizer.
- Sites are designed to work with common browsers and are formatted to render effectively on mobile devices.
- Hosting and data storage is been spread across multiple data centers to reduce the threat of a firm's website being shut down by a denial of service (DoS) attack.

### Potential Limitations

- CPASiteSolutions does not offer blog hosting, but the website can be linked to services procured from outside solutions like WordPress or Typepad.

### Firm Management

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