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Giving you practical, leading-edge technical guidance is one of the key reasons for this column's existence. As you have noted from other columns and features in this issue, there are several topics that affect document and accounting access: Document Management products, SaaS Small Business Accounting products, Small Business Specialty products, and Workflow, which is one of the greatest frontiers today. I'd

like you to consider the vision that all of these applications can work together from

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## What is your plan?

Define your need: This is a fundamental rule for all good information technology systems (and it's the second time this year that I'm reminding you of it). Every time you are considering a technology change, you need to define the need, define the costs and estimate the benefits. In our consulting practice, we always consider the needs, costs and benefits for our clients. It is so natural, we do it every time. This year and into the future, consider your needs, costs and benefits *every* time.

Most importantly, you need to consider how a new solution is going to integrate into your long-term strategy. Are you making your firm more mobile? Do you want to be able to work from anywhere? Do you need to make upgrades to your infrastructure (servers, firewalls, etc.) or should you move more into the cloud? It is okay to do things the traditional way with servers in house, and Citrix servers for remote access to enable those iPad2s you have purchased. You just have to understand the costs, risks and disadvantages of doing things in a tried and proven way.

## Safe Choices & Options

Do you need anywhere access to documents? If you are a CCH shop, consider CCH Portal. If you are a Thomson Reuters shop, consider NetClient CS or Client Portal. If you need a generalized portal or need to transfer large files easily, consider ShareFile. If you simply need to move an occasional file to a tablet or to your home computer, consider Dropbox. If you are QuickBooks-centric, SmartVault offers a great combination of document management and portal capability.

Do you need anywhere access to accounting files? If you want collaborative accounting with your clients, consider Accounting Relief or Power Practice from AccountantsWorld. With document management and portal capability included,

AccountantsWorld can handle everything in your practice except tax compliance.

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ByDesign and NetSuite, as well as the other products reviewed in this issue (see page XX or [www.CPAPracticeAdvisor.com/go/XXXX](http://www.CPAPracticeAdvisor.com/go/XXXX)).

Specialty products like audit confirmations from Confirmation and others are available via the web and headed more toward mobile devices. Workflow products like XCM, Thomson Reuters FirmFlow, CCH WorkStream, Office Tools Professional, and Results CRM are all providing workflow solutions for firms. Office Tools Professional has the added benefit of providing document management and business development through CRM. Results CRM has an entire business management suite that is integrated two-way with QuickBooks.

## A Bright Future

What do all of these applications have in common? Each one mentioned here has browser access, has a plan to add usability for mobile devices like smartphones and tablets, and is investing in your future with innovative updates. Many require no infrastructure in your firm. If you have reliable, redundant Internet access and a good firewall to protect you, these vendors can provide the services for a monthly fee. By the time you look at a five-year rotation of server hardware plus licensing expense, you'll find that the monthly expense of hosting or SaaS may be a really good alternative.

Most importantly, though, is the ability to service the client the way you want to, where you want to, how you want to, at a time the client wants the service, and with minimal effort and pain. If you find yourself working harder to provide great client service in order to stay even or get ahead in the current economic climate, technology can make it a lot easier. Remember: Technology doesn't cost, it pays!

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