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## For Accounting Firms

A new cloud-based program is available to help accounting firms provide secure portals to clients, enabling access to business files and collaboration between firm and client, as well as custom forms creation and document sharing with clients and ...

Apr. 09, 2015



A new cloud-based program is available to help accounting firms provide secure portals to clients, enabling access to business files and collaboration between firm and client, as well as custom forms creation and document sharing with clients and also between firm professionals.

The *ClientLinkPro* system allows professionals to collaborate with clients or colleagues by jointly viewing a document online and discussing it via live chat, while at the same time highlighting the sections under consideration. The system uses 256-bit encryption to ensure security and protection from hackers.

“Professionals can save thousands of dollars in printing, copying, mailing and filing costs, not to mention the time trying to connect with clients to confer or finalize documents,” said Tom Hughes, president of Main Street Financial Services, which is offering this new program.

“Even with e-mail, sending a document to a client still requires the recipient to print it, mark changes, scan it and e-mail it back,” explained Hughes. “With *ClientLink Pro*,

clients can review and make changes in that document online before signing it using

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important papers and documents.

“It’s like having a safe-deposit box in the cloud,” said Tony Cooper, vice president for client services at Main Street.

Professionals can use *ClientLink Pro* to create custom forms that clients can fill in and complete online, providing yet another tool to gather client information without using paper or snail mail.

The new program integrates completely with Microsoft Office®, allowing users to save any file from the Office program directly to *ClientLink Pro* and then to share any Office file, along with Adobe PDFs and photo files, with clients or colleagues.

Cloud Technology • Firm Management

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