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cloud-based solutions, are examples of this new reality of on-demand information and business agility.

**Isaac M. O'Bannon** • Jun. 15, 2015

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Successful business leaders and their accounting professionals are increasingly

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reception and ceremony at the California Accounting and Business Show & Conference at the LAX Hilton in Los Angeles.

The 2015 winners are:

**Avalara CertCapture by Avalara, Inc.**

A change in IRS regulations under FATCA has caused us to reexamine how W8/W9 forms have been collected. No longer can we just accept the vendors tax ID number and file 1099/1042 forms accordingly. The IRS has announced audits will begin on the backup paperwork to show compliance with the full process. The Avalara W8/W9 system allows companies to do mass mailings, catalog collected forms, build reports and also track expirations.

The key feature that improves efficiency is the online web portal that walks a vendor through the complicated W8 forms asking simple questions to allow them to complete exactly what is needed. No longer are they calling the requesting company and asking them how to complete the form (which they most likely do not know either) and they no longer need to review the complicated and overly detailed IRS regulations/instructions.

An automated solution for completing and collecting W8/W9 forms will ensure compliance with the new FATCA regulations, reduce paperwork, and improve the vendor experience by accelerating onboarding and payments. This is a significant new addition to the Avalara CertCapture product suite, extending the functionality beyond core Exemption Certificate Management automation capability and assisting tax and accounting professionals with other compliance issues.

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## **Expensify by Expensify Inc.**

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example, SmartScan reduces the amount of time it takes to do expense reports by automating what used to be a manual, data entry process.

As a result, companies are more efficient in how they do their expense reports, from first expense to reimbursement. A testimony to Expensify's simple yet powerful nature is the range of customers served. Expensify works equally well for solo-preneur CPAs as it does for accounting departments in the Fortune 500. We've thoughtfully structured the product to only expose as much complexity as the end user wants/needs without stifling functionality.

"Expensify offers an amazing product that completely disrupts the old model of expense reporting," said Doug Sleeter, founder of The Sleeter Group. "Its slick interface and ease of use makes it a no-brainer decision to use it in your business. Your employees will love it!"

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## **FileThis Pro by FileThis, Inc.**

FileThis Pro is a new cloud-based service aimed at streamlining the gathering, organizing and sharing of financial documents from clients for time-crunched accountants, CPAs, bookkeepers, and other busy tax and finance professionals. The customizable service offers tax and accounting pros a revolutionary new way to help their clients with organizing their tax and financial documents. Clients using FileThis enjoy a fully automated and branded service that fetches their bank statements, bills, and tax related documents, like W2s from hundreds of financial institutions including banks, brokerages, retirement funds, wealth management services and payroll providers and organizes them in an easy-to-use digital filing cabinet.

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LivePlan helps CPAs grow their accounting practice with additional service offerings. By using the best planning and financial management dashboard app with clients, CPAs can elevate their level of service to that of a strategic advisor.

LivePlan helps CPAs enhance their services with features including:

- **Easy Budgeting and Forecasting** – Create budgets and forecasts quickly with LivePlan's step-by-step process. Then, use LivePlan's Scoreboard to compare the budget with actual results on a beautiful financial management dashboard.
- **Seamless Integration** – Seamlessly bring your clients' QuickBooks or Xero data into LivePlan and see how their business is doing from any computer with Internet access. Never export financial data to Excel again. LivePlan automates visual reports for you and your clients with a single click.
- **Key Insights** – Advise clients on their business strategies from anywhere with a simple to read KPI financial management dashboard. Industry benchmarks show clients how they compare to their competition.
- **Fundable Business** – Plans LivePlan allows you to build a full lender-ready business plan or use the powerful Pitch feature to quickly and easily build a one-page business plan. Step-by-step guidance, one-on-one training, and over 500 business plan examples will help your clients build the plan they need, think strategically about their business, and get funded.

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### **Tallie Expense Report Integration for Intacct, by SpringAhead, Inc.**

Tallie's first-of-its kind integration just got even better with the addition of full dimension support, a complete shared multi-entity environment accessible through a single console account, and more. Access all your Intacct entities and clients through a single console account. Previously, Intacct's shared multi-entity customers had to create individual expense management and payment system accounts for each



entity. This solution, while viable, was inconvenient, created unnecessary work, and

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Plus, Tallie and Intacct's Smart Setup works right out of the box. Once connected to Intacct, Tallie immediately pre-configures approval chains based on Employee and Project managers. Tallie will even match your Project-tracking preferences—if a user is already listed as a Resource in Intacct, Tallie automatically grants them permission to track expenses against the Project. Furthermore, whenever a credit card is marked as Non-Reimbursable in Tallie, the software attempt to match it to a Charge Card Account within Intacct's Cash Management.

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CPA Practice Advisor also recognized five finalists for the Innovation Awards:

#### **AuditFile by AuditFile**

AuditFile delivers all the benefits of a paperless audit system without the need to download or install any software. Our cloud-based and user-friendly solution allows CPAs to perform more efficient engagements with less risk. AuditFile's intuitive interface requires almost no training, facilitates real-time team feedback, and manages data in ways that dramatically improve audit efficiency.

#### **Bill.com FastPay by Bill.com**

With cloud-based Bill.com Fast Pay, accountants can expedite payments and keep operations running smoothly without a break in workflow or unnecessary trips or arrangements. Accountants simply login to Bill.com from any device connected to the Internet such as a PC, laptop, tablet or smart phone. From there, they follow the prompts to Fast Pay to authorize online ePayments or checks in a cloud-based environment protected with bank-level security systems. There are multiple options for payment timelines. ePayments can be sent as quickly as overnight. Checks can be delivered overnight or within two or three days.

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Online.

### **CCH IntelliConnect Browser Search by Wolters Kluwer**

The latest addition to the award-winning CCH IntelliConnect research platform, CCH IntelliConnect Browser Search addresses several, fundamental needs of today's busy accountant: speed, accuracy and simplicity.

This installable browser add-on changes the way professionals search for tax and accounting answers by instantly sending search queries through Wolters Kluwer Tax & Accounting subscriber content, and displaying the CCH IntelliConnect answers directly on the results page of popular search engines such as Google, Bing or Yahoo!. There's no need for users to log in and no alternating between research tools. Users save both time and money by taking public and professional sources into consideration at once.

### **QuickBooks Online Accountant by Intuit**

The new QuickBooks Online Accountant has been completely reimaged to make it the most significant product offering ever for accounting professionals. QBOA is a global solution specifically designed to save accountants time, grow their practices and transform how they communicate with and deliver value to their clients.

Reinventing the way client information is managed and shared, QBOA helps accounting professionals collaborate with clients and gain insights like never before. The new product's core capabilities focus on three areas: seamlessly exposing tools and insights to accounting professionals, allowing them to seamlessly work with all their employees and clients, and transforming how they grow their practice.

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Initially presented in 2004, the Innovation Awards honor new or recently enhanced

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