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Mary Girsch-Bock • Nov. 12, 2015



If you're one of the 42 percent of firms currently offering client portals, then you probably don't need to read any further. But for the 58 percent of accounting firms that currently do not offer client portals, or perhaps need a little convincing, here are some things to think about:

- A portal can increase customer service efficiencies. Using a portal, firms can offer

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- The size is no longer prohibitive. Using a portal, you're not forced to email a large file, you'll know that many private mail servers simply cannot handle them. Portals allow both accounting firms and clients to exchange files easily, no matter what size they are.
- Many of the client portals available today offer more than a place to exchange documents. They also frequently double as a document storage option, allowing firms to place files in the portal for clients to access at their convenience. Once those files are no longer needed, they can be removed from the portal if desired, or continue to be stored in the cloud.
 - Website access by your clients will increase with the use of a client portal. By linking a client portal directly to your website, your clients are always viewing the latest version of your website, where you can continue offer additional products and services.

While portals have been around for a while, their features have evolved over time. No longer just a place to exchange documents, portals offers a variety of related tools including the ability to be notified when a client accesses a document in the portal. Accounting firms can also set up notifications that will send an email to a client when a document has become available in the portal. Integration with popular tax software products has also increased efficiencies, with firms able complete a tax return and simply upload the file to the integrated portal.

2015 Reviews of Client Portals for Accounting Firms

- [AccountantsWorld](#)
- [CCH Axcess Portal](#)
- [Citrix ShareFile](#)
- [SmartVault](#)
- [Thomson Reuters NetClient CS](#)

Another advantage of using a client portal is that the portal can be custom designed

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The products reviewed in this month's issue can be used in conjunction with related tax and software applications, or as a stand-alone solution that is suitable for accountants no matter what tax software is currently being utilized.

Portals are also convenient for firms offering payroll services; allowing clients and their employees to access payroll related data such as paystubs and W-2's.

All of the products included in this review offer a free trial, so users can take some time and try out a few products to see what suits their needs and the needs of their firm. All of the products also offer complete information on encryption levels, pricing structure, and additional tools and functions available.

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