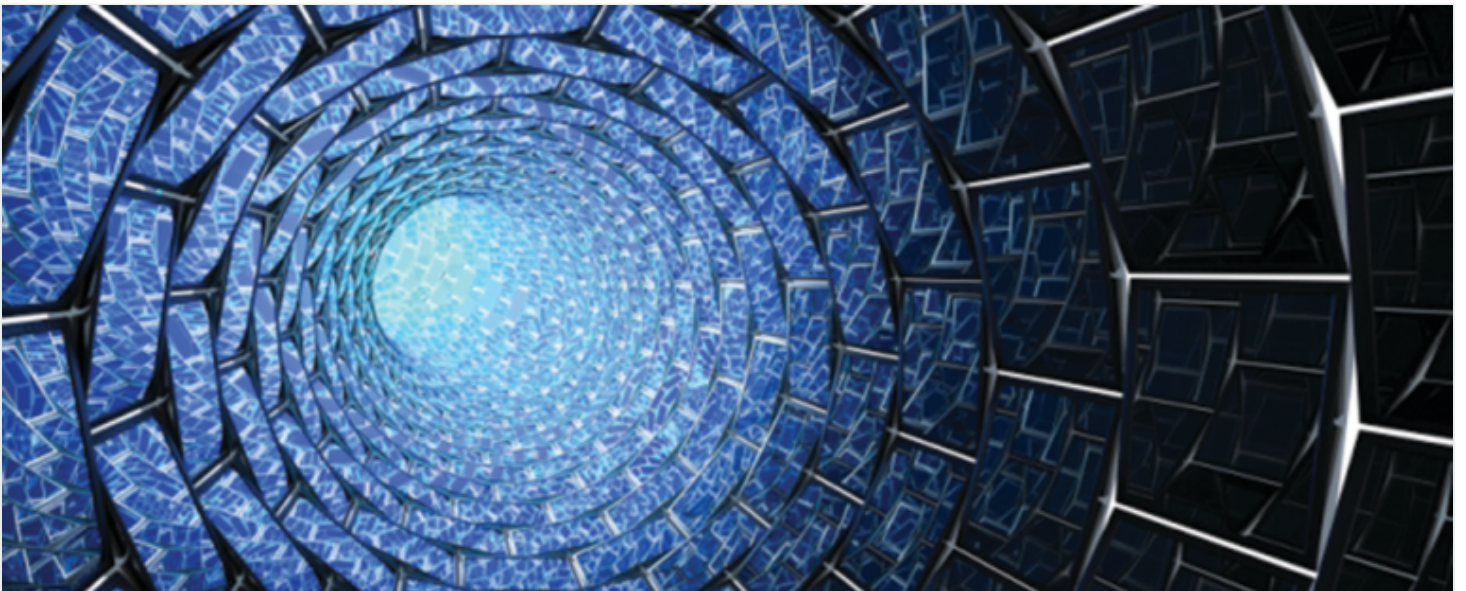


Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

their practice management systems and were integrated into early web sites.

Randy Johnston • May. 22, 2017



Top Technology Initiative Article – From the May 2017 issue.

Portals have been in existence in the accounting profession for around 20 years. Many public practice firms set up proprietary portals that had integration benefits to their practice management systems and were integrated into early web sites.

Even more firms used products like **Citrix ShareFile** to transfer large files and set up inexpensive, easy-to-use portals to transfer files such as QuickBooks desktop files or scanned images of documents. Citrix has added eSignatures, a document gathering facility with its PBC list tool, and an approval workflow to make working with clients more automated. XCM's workflow product had a notable breakthrough in 2015-2016 with two-way collaboration from a public accounting firm directly to an industry business workflow and back to the accounting firm. Several vendors are bringing products to market that provide a document gathering and delivery system with **SurePrep TaxCaddy**, my favorite new portal product of 2016. Other practitioner

products released last year included: CCH My1040Data for Axxess, cPaperless

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

SaaS product has worked for many businesses. But the technology that is breaking through with these products is portals. It seems like every collaborative accounting product has a portal, and the innovations here in 2017 are something to behold. If you have not looked at portals in a while, it is time to see what the publishers have done!

What Portal Tools?

So, who has introduced portals worthy of review? I believe there are at least four new portals of note introduced in 2017. However, there may be a dozen or more that are a good investment of your time to review based on the needs of your practice. Let's start with the capabilities of **ADP's payroll portal**. This vendor has accomplished several things that all good portals should contain: 1) an overall view of all clients, 2) security based levels decided by the firm so only authorized users can see information whether they are in the firm or at the client, 3) the portal can be entirely self-service minimizing the interaction required with end-users, and 4) integrated tools are included to help with normal business activities. In the case of the ADP portal, they have included the IntelliConnect payroll research at no charge from Wolterskluwer.

The next major portal tool delivered is the **Sage Accountant Cloud**. Announced at Sage Summit, the product has client-centric workflows, and integrates with the Sage Practice Cloud. There are several tools included: Client Manager with Practice Financials, Sage Live with the Services Manager which has Sage Payroll, and integrations to Sage Live, QuickBooks Desktop, QuickBooks Online, Sage One, Sage 50c, Xero, as well as some other planned connections in 2017. The Practice Manager has tools for productivity and control. Sage Match (which is much like Intuit's Find a ProAdvisor) and other supporting tools such as Pegg make for a well-rounded, single-stop portal.

Another product that caught our attention on release last year on November 1 was

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

your time, and provide access to the full content. These included are proactive notifications. Microsoft has plans for more connections in 2017. You can see for yourself – by signing up for the free trial at the [sign up page](#). With Microsoft's Cloud strategy including more than 100 datacenters globally, a new release of Windows 10 last month, and continued migration to Office 365, Dynamics 365 for Financials can round out an entire strategy using Microsoft tools. According to a report in *The Economist* in March, the total revenue generated by Microsoft's cloud strategy is greater than the former cloud leader of Amazon Web Services.

One final new portal of note comes from the SaaS vendor Zoho and their new ZohoOne strategy. This vendor has a collection of 30+ tools that include accounting software, portal, VOIP phone integration, CRM, email, eCommerce and web site capabilities, payments, expenses and more. Zoho's premise is that most people are interacting with either web browsers or mobile devices, and their products are optimized to work with both. For a complete, collaborative portal experience, **Zoho's Portal** could be your ticket.

What To Do?

Over the past few columns, we have discussed business strategies and other critical factors like cash flow. For over 20 years, I have recommended that you implement a portal strategy. Many of you have done that, but it is time to look at your business needs, and determine if your current portal is meeting your needs. Virtually every software publisher has implemented a new portal incorporating responsive design (that adjusts to various web browsers or mobile devices on the fly). All the portals reviewed this year have become easier to use, and serve more broad client needs. Think about the portals you use on a regular basis. Is your portal as good? Why not?

Consider the features that you consider important. This could be document upload, payments, expense reporting, financial reporting, final document delivery,

collaborative accounting, payroll, and more. You can look at the tried and true

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved