CPA

Practice **Advisor**

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Accounting and tax firms that want to have a professionally designed website done by experienced and dedicated professionals should take a close look at CPASiteSolutions. CPASiteSolutions has been serving accountants since 1999, and currently manages the websites for over 4,000 accounting firms. A typical site will contain almost 300 pages, mostly consisting of syndicated content provided by CPASiteSolutions. Although the client firm can make changes using the powerful WYSIWYG editor, in practice most major design changes are handled by CPASiteSolutions' professional staff.

Domain name acquisition or transfer is handled by CPASiteSolutions, is unique to the tax and accounting firm and is always owned by the firm. Sites are hosted on two identical data centers, with redundant power supplies and excellent Internet connectivity. If one of the data centers goes offline for any reason, the remaining server is fully capable of handling the hosting in real time. Custom domain-based email accounts are created for every firm member, with 7GB of storage at no additional charge. These accounts can be upgraded to a hosted instance of Microsoft Exchange groupware for \$9.95 per user, per month. All e-mail accounts are protected with state-of-the-art spam filtering and anti-virus software. Firms also have the option of running their own e-mail server if desired.

The broad range of content, tools and services available through CPASiteSolutions is impressive. Firms have access to more than 3,000 pages of professional syndicated content to provide current and prospective clients of the firm. Partners can choose topics and material that fits their practice development objectives and marketing plans. Hosting plans include more than 50 interactive calculators, assisting with issues as diverse as payroll, retirement, college savings, estate planning and major purchases. CPASiteSolutions produces a monthly client newsletter and offers tools to assist with newsletter e-mail list management, including opt-in and opt-out

messages. Every website has access to a 10-page tax center, which features frequently

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using an SSL encrypted web browser. CPASiteSolutions offers many additional functions to help firms work with clients and employees, such as online job applications, incorporation services, e-commerce and credit card invoice payment processing.

All sites are submitted to the major search engines, and CPASiteSolutions provides each one with an online Webalizer feature that provides important data in both graph and chart form. Advanced search engine optimization and keyword development are also available for an additional charge.

Although the scope of this review is the website offering, CPASiteSolutions also offers application hosting for common practitioner tax applications (e.g. Lacerte, ProSeries, Drake, and UltraTax CS) and client bookkeeping software such as QuickBooks Pro or Premier. The optional virtual office environment for practitioners using Intuit or Drake applications that provides integration with a web portal, hosted e-mail, and the firm's website is a unique offering not provided by any other products in this review. The client and practitioner hosting service makes it possible to use the website as a communications hub between the firm's professional staff, prospects and existing clients. Staff can access client data and applications to work from anywhere with a high-speed Internet connection.

CPASiteSolutions offers an impressive range of products and services at a very reasonable price. The inclusion of tools for client portals, tax organizers, and client payroll with an impressive amount of content make CPASiteSolutions an excellent value for firms who want to create an interactive website that simplifies communication between clients, prospects, staff, partners and job applicants. Three service levels are available, with the Silver Service Level costing \$49.50 per month with no setup fee. Custom website design ranges in cost from \$195 to \$295. Extra

storage space, exchange server hosting and online access to accounting, tax and

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