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## Review of Website Builders for Accountants — 2006

The evolution of automated website building tools is astounding. Just a few years ago, when we started reviewing such products that are geared primarily for accounting firms, most were very much cookie-cutter machines...

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By Isaac M. O'Bannon

*From the Dec. 2006 Issue*

The evolution of automated website building tools is astounding. Just a few years ago, when we started reviewing such products that are geared primarily for accounting firms, most were very much cookie-cutter machines that produced generic websites that often looked the same as every other one produced using the same tool. Likewise, there was a dearth of automated content that firms could have on their websites without having to perform a lot of work. This essentially

left firms with the option of hiring outside web development firms, settling for a cookie cutter site, or trying to develop and manage their own site manually. Most accountants are not web developers, of course, so certainly many quality issues arose, not to mention the time it took away from billable engagements.

We've come a long way, even in just the last few years. Several website development options are now specifically designed for accountants. And they are not only easy to use, but also offer truly professional design, both from a technical and aesthetic aspect. Many of these systems also provide excellent

content options, from periodic newsletters and articles on tax and financial matters that automatically post to the site, to financial calculators and other features. Remember, having a stale website with no client-focused content is about as useful as a phonebook ad. The phonebook serves a purpose, but valuable content, advice and tools can keep you on a prospective client's radar and can also help steer existing clients toward additional services.

Another major development has been the continued growth of secure client collaboration

tools, specifically client portals and online tax organizers. These allow clients to upload financial documents and other materials. They also provide firms with the ability to allow clients access to some of their prepared files and documents, lessening the need for paper copies and wasted time. Remember, this saves the client time, too — a win-win.

All of the website development tools reviewed here are specifically geared toward use by accounting and tax firms, offering varying degrees of content as mentioned above, as well as additional tools such as personalized e-mail, tax return status lookup for clients, and a variety of marketing tools. Most of the options in this review are do-it-yourself (DIY) systems with automated content and tools. However, two can be totally hands-off, with the vendor providing all setup, maintenance and editing of the websites. I make no judgment call on which of these methods is better as this will depend on the preference of the firm. While hands-off systems require less work from the firm, they can have a slightly higher price tag. And while the firm doesn't have to perform the edits it requests, it may have to wait a little longer to have the vendor make the changes rather than have someone in-house available to do it. So find out what your firm considers the most important factors and how involved with the system you would like to be. But don't worry, even the DIY systems covered here shouldn't require more than 30 to 60 minutes to initially set up the website, and perhaps 15 to 30 minutes per month to perform minor edits.

The website building solutions reviewed here were evaluated on the factors outlined below. A summary section also concludes each review, identifying the key benefits of the system and providing an assessment of what types of firms would best benefit from its use.

**Website Setup/Maintenance:** What features aid in the setup of the site, and what kind of templates are available for its design? Fewer templates and customization options can result in websites that can look and feel the same as every other one the system produces. Additionally, this section looks at the ease with which customization and edits of the website can be performed.

**Automated Content:** What articles, newsletters and financial tools are available to easily place on the website without having to maintain or update it? This content keeps the website fresh and informative, which can keep visitors coming back. That of course, can result in more engagements.

**Visual Quality/User Navigation:** The appearance of a website and its navigation flow are important factors. Websites for professional firms should likewise be professional and should reflect the atmosphere of the practice. This section also looks at the available templates and how the system incorporates firm logos and other image files.

**Special Features/Tools:** Extra gadgets. Here I look at the additional functions that are available, from e-mail, to domain registration and other tools.

**Site Marketing:** How well does the site reflect the firm? There are still a couple of site building tools that put their brand logo on the websites, but for the most part this has faded away. Also, what tools for mass distribution of newsletters are available, and does the system provide statistics on website visitors?

**Support:** If trouble arises, how easy is it to find the solution, whether through an online support center, a Help utility or through live technical support? □

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## AccountantsWorld — Accountant's Office Online

The Accountant's Office Online suite from AccountantsWorld is the central component of the vendor's collection of online services, combining a website building tool for professional firms, as well as a portal for firm staff to access online accounting programs. It also offers secure access for clients to access records that the firm has made available to them.

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## Build Your Firm — Website Development & Internet Marketing

Build Your Firm offers a full-service website development package, which includes newsletters, in-depth financial articles, financial calculators, secure online file transfer, and several other tools, including search engine optimization of websites. The company is a marketing firm that is specifically geared toward assisting accounting practices and was co-founded by a CPA and an MBA.

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## CCH, a Wolters Kluwer business — ProSystem *fx* Site Builder

ProSystem *fx* Site Builder provides professional accounting firms with a template-based website and maintenance system that includes a variety of add-on content options geared toward financial services. The system also provides newsletters, tax alerts, secure client portals for exchanging financial documents, and financial calculators and toolkits for financial planning and small business management.

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## CPASites.com — CPASites.com

CPASites.com provides full web development, maintenance and hosting services for professional accounting firms, with specialized

content, financial calculators, tax estimators, and tools geared toward individual and business accounting clients. Unlike most of the website building tools contained in this review section, this vendor's web services are intended to be a "hands-off" solution, with all website design and content edits performed by CPASites.com.

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## CPASiteSolutions

### — CompleteWebSuite

The CompleteWebSuite package from CPASiteSolutions lives up to its name, providing a full, highly professional website tailored to the needs of public accounting practices. It offers hundreds of pages of automated content, newsletters, financial calculators, secure client portals, staff portals and other valuable tools.

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## Tenenz — Accounting & Financial Site Builder (AFSB)

The Accounting & Financial Site Builder (AFSB) system from Tenenz (formerly Tax-Aid), offers a quick and easy-to-use website creation tool that offers moderate customization capabilities along with financial tools and calculators, a newsletter, and articles on tax and financial topics for businesses and individuals.

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## Thomson Creative Solutions — Web Builder CS

Web Builder CS from Thomson Creative Solutions provides a template-based site creation tool for accounting firms that offers a variety of content, financial calculators, calendars and other tools from notable financial sources, including PPC newsletters and alerts, and Forefield KnowledgeTrust. The system can support any number of pages and also provides the user firm with personalized e-mail addresses.

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## Thomson GearUp — Accountant-City/TaxBeacon

The Accountant-City and TaxBeacon web building systems are identical, providing a website creation tool for accountants and tax professionals with the ability to add hundreds of pages of automated content on topics ranging from business financial information to estates, retirement planning and education, as well as a variety of financial calculators, a newsletter and various other tools.

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### Website Advice to CPAs

Everyone knows that a website is necessary for a modern professional services firm and that a website can provide much more than just a static phone-book style information page. But if you are in the majority of professional accountants, then, unfortunately, you probably don't know much about how websites actually work for a firm, much less how to fully optimize the effectiveness of your own firm's website.

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Drake Software, maker of one of the most popular professional tax preparation systems, offers all of its users free websites through the company's [www.1040.com](http://www.1040.com) portal, which offers general tax information for public visitors. Websites created by tax and accounting professionals are hosted for free as subdomains of the website.

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## 2006 Review of Website Building

### Tools for Accountants — Executive Summary

This review conclusively confirms the fact that Fixed Asset software has entered a new age — a new age where software vendors, reacting to the needs of the marketplace, have redesigned and enhanced their

fixed asset software offerings to meet the growing needs of users, and to better take advantage of technological advances in hardware.

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