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**ADVISORY**

# SaaS and Mobile Solutions are Big Winners at 2012 Innovation Awards

Taija Sparkman • Jun. 28, 2012



As tax and accounting professionals make plans to move their firms forward, certain buzz words continuously show up: SaaS, on-the-go, real-time collaboration, the Cloud, mobile, instant, client portal, mobility. It's obvious that success in tomorrow's world is reliant upon professionals and their clients having access to the information they need the most when they need it. This year's Tax and Accounting Technology Innovation Awards reflected that concept, as all winners were SaaS or mobile app technologies.

"The fact that all of this year's Innovation Award winners are web-based products or apps underscores the growing importance of SaaS solutions for accounting and tax professionals," said M. Darren Root, CPA.CITP, Executive Editor of *CPA Practice Advisor* and Managing Partner of Root & Associates, LLC.

The annual awards reception was held in June at the California Accounting and Business Show and Conference in Los Angeles. Greg LaFollette, Vice President of Product Strategy for CPA2Biz, started the Innovation Awards nine years ago and winners are selected by our editorial advisory board and awards committee, which include thought leaders within the profession and accounting and tax professionals from across the country. The committee looks for technologies that are new or recently enhanced to help professionals and their clients streamline workflow, increase accessibility and security and improve the client collaboration process.

"You know if you look back to when our innovation awards started, Greg LaFollette was the Executive Editor of at the time, and I think this is a great thing that he started," Root said in remarks during the presentation ceremony. LaFollette is now the vice president of product strategy for [CPA2Biz](#), a subsidiary of the AICPA. "What's interesting is that we've come full circle now: Greg started the awards nine years ago and this year CPA2Biz is getting an Innovation Award."

"Thank you, Greg, for conceiving of and starting the innovation awards. I appreciate that. It gives me something to do on Monday nights," laughed Root before presenting CPA2Biz with an Innovation Award for their CPA.com email solution.

While many of today's mobile apps and solutions are created to streamline collaboration between professionals and their clients, several award recipients highlighted the importance of collaboration among vendors as well. When tax and accounting software and solutions easily integrate into a firm's existing accounting system and each other, it helps tax and accounting professionals more effectively meet the needs of their clients. Erik Asgeirsson, President and Chief Executive Officer

of CPA2Biz pointed out in his acceptance speech that vendors also benefit when their solutions can integrate with each other.

“It’s important for this community to get together,” said Asgeirsson. “We all are collaborating quite a bit, driving a lot of innovation and a lot of value for a market that’s not just supporting accounting firms, but it’s also supporting small businesses across America.”

“Often times, we wind up partnering together and I think it’s really great to see everybody get a little piece of this award,” said Mike Sabbatis, President and CEO of CCH, a Wolters Kluwer business, which received recognition for its ProSystem *fx* Document system. “Honestly, from CCH, I’m really happy about getting this award tonight, but to each of you I think there’s something to work for. This is a good place to get recognition.”

The 10 finalists, including the winners listed below, are: Bill.com Receivables; CCH ProSystem *fx* Document; CPA.com Email Solutions from CPA2Biz; Intuit Online Mobile Payroll; Accounting CS Client Access from Thomson Reuters; AvaTax 1099 from Avalara; BillQuick 2012 from BQE Software; Concur Small Business Edition; Fujitsu fi-6130z and SmartVault Plug-in for Microsoft Outlook.

“From remote access tools and mobile apps that extend a professional’s reach to virtually anywhere they are, to programs for payroll, tax, accounting or other tasks that are designed specifically for web-based use, these technologies are increasingly being adapted in forward thinking firms who see the advantages they offer for increasing productivity and maintaining a positive work-life balance,” said Root, who is also CEO of the technology consultancy RootWorks, LLC.

## 2012 Innovation Award Winners

### Bill.Com Receivables

Two years after winning an award for creating a product that streamlined how firms managed their payables, Bill.com is receiving another award for incorporating receivables into their system. Now users are able to manage invoices and incoming payments more efficiently and effectively.

“Winning an award really speaks to Bill.com’s focus on listening to customers, really innovating the product and focusing on what matters, which is ultimately the customer,” said Bill.com vice president of Strategic Partners Christy Ross upon

accepting this year's Innovation Award. "This last year we were really, really focused on this industry and targeting professions."

### **CCH ProSystem *fx* Document**

Firms can choose between the SaaS or On-Premise version of CCH's ProSystem *fx* Document for a completely paperless document management solution. With ProSystem *fx* Document, users can search for files by client name, client ID, file name, assigned classes or keywords. Tax returns can be filed electronically, stored according to each firm's record retention policy and marked for automatic deletion upon expiration. ProSystem *fx* Document integrates with other ProSystem *fx* products, allowing for real-time collaboration with clients through the ProSystem *fx* Portal. The document management solution offers users data and document security with password-protected access, file encryption and automatic virus scanning.

### **CPA2Biz – CPA.com Email Solutions**

CPA2Biz, the marketing subsidiary of the AICPA, now offers CPA.com branded email for all AICPA members for an annual fee. The email solution eliminates the need for generic email providers, such as Google, Yahoo or Hotmail, and offers members an email in that emphasizes their CPA designation.

The CPA.com email solution offers two options – a full email account with send and receive capabilities or a forward-only service. The forward-only option allows professionals to receive messages at a CPA.com email address that is forwarded to an email address of their choice. With this option, users cannot send messages from the CPA.com email address. The email solution is web-based and compatible with Microsoft Outlook and Apple Mail and has 25GB of storage.

### **Intuit Online Payroll Mobile**

Intuit's mobile app integrates directly with Intuit Online Payroll, allowing firms and small businesses to manage clients, employees, contractors, time and other payroll tasks from anywhere inside or outside of the office. Users can view past paychecks and create new ones. Intuit Online Payroll Mobile allows users to pay staff using direct deposit or paper check and stubs are automatically emailed to workers who signed up for Paycheck Records.

“Our mission is to make employee management as easy as possible for accountants and small businesses,” said Katherine Morris, Group Product Manager at Intuit. “We heard our customers loud and clear. They told us they want to be able to run payroll away from their office, to not be tied to an office, not be tied to a computer. In fact, we recently did a survey and 60 percent of accounting professionals and small businesses said that they believe that the future success of their business hinged on the ability to have access to mobile solutions.”

### **Thomson Reuters Accounting CS Client Access**

The latest version of Accounting CS features an enhanced Client Access database. Clients now have access to a full-featured, web-based program that integrates directly into the firm’s accounting systems, giving both clients and firms the ability to work together in real-time.

Features include a streamlined workflow, customizable services, check writing and automated payroll. Users can customize their clients’ experience, including controlling what data they have access to and how the client interface looks. Professionals are able to provide the most up-to-date information in a secure environment, including online bank transactions and payroll and W-2 information.

“When the developers set out to build Accounting CS Client Access, being innovative and building something truly unique was the goal, so this award really reinforces that and it will be great to share with everyone back at the office,” said Scott Fleszar, Vice President of Strategic Marketing, Tax and Accounting, Thomson Reuters.

Visit [www.cpapracticeadvisor.com/10727349](http://www.cpapracticeadvisor.com/10727349) to view a photo gallery from the 2012 Innovation Awards.

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