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We can help our clients in so many ways in the areas of business advice and technology. Now that tax season is behind us for another year, it is the perfect time for us to help our small business clients figure out how to run better and more profitably. Our accounting and management advice and insight is truly valuable to clients, yet we often underestimate how valuable our technology advice can be to them. As you can see throughout the rest of this issue, accounting software, document management and workflow are key technologies that you need to be comfortable enough with to make recommendations.

ACCOUNTING SOFTWARE

First, let's start with accounting software. One size does not fit all is my clear conclusion after following this industry for 30 years. You can recommend very simple systems like Sage Billing Boss or Freshbooks to complete simple invoicing, and then help the business graduate into more capable accounting like Peachtree by Sage, Accounting Relief or QuickBooks. Taking the time to understand your client's needs can make a significant difference in what should be used in the business. For example, Freshbooks or Billing Boss can handle the routine invoicing of most service businesses, including recurring invoices, online payments and other advanced features. These products can support this activity from a mobile phone. Why would you want to complicate a business owner's operations with unneeded accounting software if all they really need to do is pay bills, send invoices and collect money? Wouldn't you rather have the services revenue and business relationship of a write-up client than wasting the client's time keying transactions and wasting your time by resolving those transactions?

If the need is greater, perhaps a collaborative approach in accounting software is your best option. For a flat fee, you can have an unlimited number of clients on Accounting Relief and get the benefits of being able to work collaboratively with the

client, process transactions that are downloaded or keyed into the system, and have

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image, and it reduces the amount of unnecessary work that you have to do if you make the right accounting software recommendation for the right reason. See the small business accounting review that focuses on SaaS-based products on pages XX-XX of this issue. You can also read *The CPA Technology Advisor's* review of on-premise small business accounting products from the April/May 2010 issue at www.CPATechAdvisor.com/go/2738.

DOCUMENT MANAGEMENT

The same thing is true when it comes to document management strategies for your clients. You have to know enough about how to help a small business with their documents and workflow to be able to make a reasonable recommendation. Part of the issue may be that you do not have the documents in your practice automated enough to understand how to make recommendations to your clients. Part of the issue may be that you don't believe this is an area that you should assist with.

However, if you have document management running in your practice with tools like Office Tools Pro, Thomson Reuters' FileCabinet CS, Doc.It or CCH's ProSystem fx Document, you probably have an understanding of what the benefits of document management and portals are to the small business. Unfortunately, these products are geared toward tax and accounting professionals and aren't particularly a good fit for industry or small business. However, if you are using the AccountantsWorld document management product to run your practice, you can actually make this capability available to your clients, as well. Both you and the client benefit from using the same system. As well, products like eFileCabinet, SmartVault or Cabinet NG may provide enough capability to the small business to solve their initial document management needs. See the review of document management products in this issue on pages XX-XX, as well as Doug Sleeter's column on page XX. And keep a look out for the July 2010 issue where document storage products will be covered.

WORKFLOW

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reduce the cost of interfacing to external audit teams in addition to reducing the closing cycle times. These types of tools can make small businesses more profitable by saving time and money.

Rule – Insert Line

As you reflect on how to help your clients this year, consider the benefits of assisting them with automating their accounting at the right level, adding document management and applying workflow technology. Your clients will appreciate and value your expertise even more for helping them become more efficient and profitable than they do for keeping them out of trouble with your compliance work. And as added side benefits, you will find the work more satisfying and profitable, while potentially helping small businesses help our economy prosper.

Technology

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