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Rick Berry • Feb. 01, 2013

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The awareness level among CPAs, tax professionals and other financial advisors begins with an awareness of the mobile technology that is available to them for their own use — technology that enables them to view their projects, tasks, client demos, track time, and monitor expenses all from within a mobile environment, technology that enables the data to be accessed instantly, from any device and from any location, at any time, anywhere.

Mobile applications make running accounting firms easier and smoother — and the delivery of services to their clients more seamless and effective. Many CPAs are already on the mobile bandwagon as far as this aspect of the mobile revolution is concerned, and it's not surprising that they are.

But, as with any service provider, CPAs are in the business of adding value to the

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sales, lowered costs, and/or improved customer experience leading to greater customer retention.

Most business owners want their information and they want it now — immediately, right now, from anywhere in the world. But Small and Medium size Business owners often instinctively feel that the kind of instant, all-platform business intelligence access that they would love to have, simply isn't available to them at a cost that they can afford. And so they don't even research solutions let alone pull the trigger and acquire them.

It's up to the practitioner to make them aware of the technology.

Whereas until very recently, POS solutions — mobile and otherwise — carried with them a very hefty price tag in the form of up-front licensing fees, tech and support fees. Initial setup easily would cost tens of thousands of dollars, and monthly run costs per station were so high as to effectively eliminate these solutions for many smaller and medium sized businesses.

But all of that has changed, and CPAs need to be aware that there are point-of-sale solutions that come packaged as Software as a Service (SaaS) with no upfront licensing fee; which use commercially available iOS devices such as the iPad, iPhone, and iPad touch, and which cost as little as \$40-\$50 per month per device.

These are not simply credit card processing systems — they are robust, full-featured mobile point of sale systems that carry out the full range of POS functions and include full integration with QuickBooks, Oracle, Peachtree, and all the major accounting software so that each transaction is instantly booked into the system, inventory is managed, all in a one step process from the floor of the enterprise with no need for any other data entry.

Seamless connection in real-time, with all the information instantaneously

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business intelligence platform for that particular business and they should know why that POS solution is the best fit for that particular business? This is something that is easy to do in this day and age.

Examples of these systems that are currently available are NCRs 'Silver', VeriFone's 'Global Bay' enterprise solution and ABC Mobile Pay's 'Enterprise' solution.

The POS feature set that each solution provider offers varies from a fairly light version offered in the NCR 'Silver' solution to the more robust Global Bay offering which includes inventory control and financial reports, to the most advanced solution on the market from ABC Mobile Pay, their 'Enterprise' version which enables inventory & price control, back-office management site with data delivery and reporting all while seamlessly integrating with QuickBooks, SAP, Oracle or any other backend accounting/bookkeeping solution.

Can you see the value here? Is this beginning to make sense? Business owners make major life decisions, business decisions, and investment decisions based on the advice that a CPA or trusted advisor gives them.

Going mobile is just such a decision.

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