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PORTALS

Integrated Portal Options for Client Collaboration

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From the [April 2013 review of portal systems](#).

Although our review is focused on solutions which are separate from the other applications used by an organization, there are some solutions which offer portals as an integrated add-on feature. We excluded these from our traditional review, but these tools should be considered for those who use (or are considering) the related options.

The three add-ons are all related to tools that are primarily designed to provide document management and/or workflow management to a firm. They are:

- Doc-It Portals
- Office Tools Professional Client Portal
- XCMportal

Doc-IT Portal

Doc-It is a well-regarded document management system for small and mid-sized accounting firms. The Doc-It Suite is made up of the Work Binder application for managing engagements, the Archive for storing completed engagements in their final PDF form, and the Doc-It Portal for sending and receiving files from clients and others outside the firm.

Unlike every other product evaluated as part of this review, Doc-IT is the only one which can be hosted on a firm's internal servers or hosted by a third party. For more information on the Doc-It Suite, visit www.doc-it.net.

Office Tools Professional Client Portal

Office Tools Professional is a popular practice management application for small and mid-sized accounting firms. The company's primary application (Office Tools Professional) provides document management, time and billing, and customer relationship management in a single piece of software.

The optional portal module makes it possible for firms to send and receive files with clients from within a service which is directly integrated with the Company's practice management application. Invoices can also be sent to clients using the portal. For more information on Office Tools Professional, please visit the Company's website at www.officetoolspro.com.

XCMportal

XCM*portal* is a service which is designed to assist firms and clients with collaboration by providing a secure website where they can request and receive documents. Staff can post lists of missing items or open questions to the portal for a client, and the client can respond securely in writing using the secure portal platform. For more information, visit www.xcmsolutions.com.

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