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Isaac M. O'Bannon • Jun. 28, 2013



From the July 2013 issue.

“Is anybody even developing new desktop software anymore?”

That question came from Executive Editor Darren Root, CPA.CITP, as he was preparing to present CPA Practice Advisor’s 10<sup>th</sup> annual Tax and Accounting

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Thomson Reuters; Intuit's QuickBooks Online for iPad; and SmartVault for QuickBooks Online.

The five finalists for the 2013 Innovation Awards were also recognized: ADP Smart Compliance; AICPA Navigator from CPA2Biz; the BNA Income Tax Planner Web system; CertCapture from Avalara; and Confirmation.com.

The Innovation Awards were first presented in 2004, and serve to honor new or recently enhanced technologies that benefit tax and accounting professionals and their clients through improved workflow, increased accessibility, enhanced collaboration or other means.

"Technology has been a driving force behind the significant advances that professionals have made in productivity, and enhancements in workflow efficiency have been at the core of this evolution," said Root, who is also the managing partner of the Bloomington, Indiana, accounting firm Root & Associates, LLC, and is CEO of RootWorks, LLC.

"With increasingly mobile lifestyles, it is not surprising that this year's award winners and finalists are all cloud-based, since professionals have come to expect full access to their programs and data anywhere, at any time, and from whatever device they prefer to use."

Award winners are selected by *CPA Practice Advisor's* editorial board and awards committee, which include thought leaders and professionals from across the country. The publication, along with its digital content and interactive media, is the leading independent source of practice management resources and technology information for tax and accounting professionals in public practice.

## 2013 Innovation Award Winners

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Public Accounting and still be driving truly revolutionary innovation in helping our firms grow, manage, and protect their business.”

### **Doc.It Suite**

Doc.It Suite was awarded a 2013 Innovation Award based on numerous innovations during the last 18 months, evidence of the company's continuing research and development efforts to help accounting firms standardize and ease document management with workflow. These include the addition of new workflow tools, web portals, cloud-based technologies, PDF editor, publishing functions, dashboards, search functions, reporting and the new Binder Explorer utility.

“Everyone at Doc.It is excited and honored to win the *CPA Practice Advisor* Innovation Award,” said Brock Philp, President and CEO of Doc.It. “We fully recognize we are amongst tough competition. A key part of Doc.It's culture, and what makes our company excel in this industry, is our customer-driven product management philosophy which results in constant and interactive discussions with our customers on a daily basis.”

### **NetClient CS Mobile App**

The first mobile app of its kind, NetClient CS mobile lets accounting firms give their clients mobile access to the services and content that the accounting firm performs for them. Clients can access tax returns, financial statements, and other documents that have been pushed to NetClient CS by the firm, as well as online accounting and payroll services and more. The firm-branded app makes real-time collaboration between accountants and their clients easier, more automated and more convenient.

“The NetClient CS mobile app opens a whole new set of possibilities for how accounting firms connect and collaborate with their clients,” said Scott Fleszar, vice president, strategic marketing, for the Tax & Accounting business of Thomson

Reuters. “From viewing and sharing finished reports, statements, and tax returns,

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that leverages device features, including integration with the camera, contacts, notifications and location services, to save small businesses time on key business tasks.

“When the iPad came out, we saw it as an incredible opportunity to solve our customers’ needs even better,” said Will Lynes, senior product manager, QBO for iPad. “Portable and simple, we envisioned an accounting product that would let more small business owners than ever before be successful with QuickBooks. We aimed to eliminate the learning curve and make a product so easy and beautiful that small business owners would want to use it.”

### **SmartVault**

SmartVault received one of this year’s awards by taking its patented Toolbar technology for QuickBooks and extending support to QuickBooks Online. For the first time, users of QuickBooks Online can now attach and view source documents (such as receipts, bills, and invoices) directly from within QuickBooks Online. SmartVault is the first to deliver this type of “attach and view” document management functionality integrated seamlessly into the QuickBooks Online interface. Currently, QuickBooks Online does not offer this functionality to its users.

“Our vision at SmartVault has always been to find ways to inject technology directly into applications that businesses already use in order to create more efficient workflows and ultimately increase the value of that application to the customer,” stated SmartVault founder and CEO, Eric Pulaski. “It’s incredibly exciting for us to see this vision become a reality for thousands of customers and an honor to be recognized by CPA Practice Advisor for our efforts. It’s a huge win for the entire SmartVault team.”

## **2013 Innovation Award Finalists**



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and competency requirements and helps professionals and firm administrators spot gaps in training and map out career development paths. The cloud-based system's content can be accessed anytime, whenever it is most convenient for them, and firms can also schedule on-site training. Administrators can set up alerts, assign requirement courses and suggest appropriate programs to build specific skills for staff members and groom promising employees for leadership posts.

### **BNA Income Tax Planner Web**

BNA's desktop system has long been recognized as one of the premier tax planning systems. In April 2012, Bloomberg BNA launched a SaaS edition, BNA Income Tax Planner Web, that made the solution even more powerful. BNA Income Tax Planner Web allows professionals to efficiently show clients their tax situation with in-depth analysis and comparison of multiple, side-by-side scenarios for federal, all resident states, NYC, DC, and over 30 nonresident states. Always in compliance, it provides anytime, anywhere web access to the most accurate, up-to-date calculations and analysis.

### **CertCapture from Avalara**

The CertCapture system offers advanced, online document management tools for collecting, managing and retaining sales tax exemption certificates; reporting and analysis of tax status; and audit exposure. Built for any size business, Avalara CertCapture databases easily scale into the millions to meet the storage demands of even the largest corporations. The system is ideal for groups with resources in multiple locations and can be configured for each business entity in a multi-level environment.

### **Confirmation.com**

Confirmation.com's electronic audit confirmation solutions were recently expanded to include a new electronic AR/AP Confirmation application. Until now, auditors

created AR/AP confirmation requests using some type of mail merge functionality

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revised during the past two years, it must be in full release (not Beta), and it must be actively marketed to tax and accounting professionals.

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