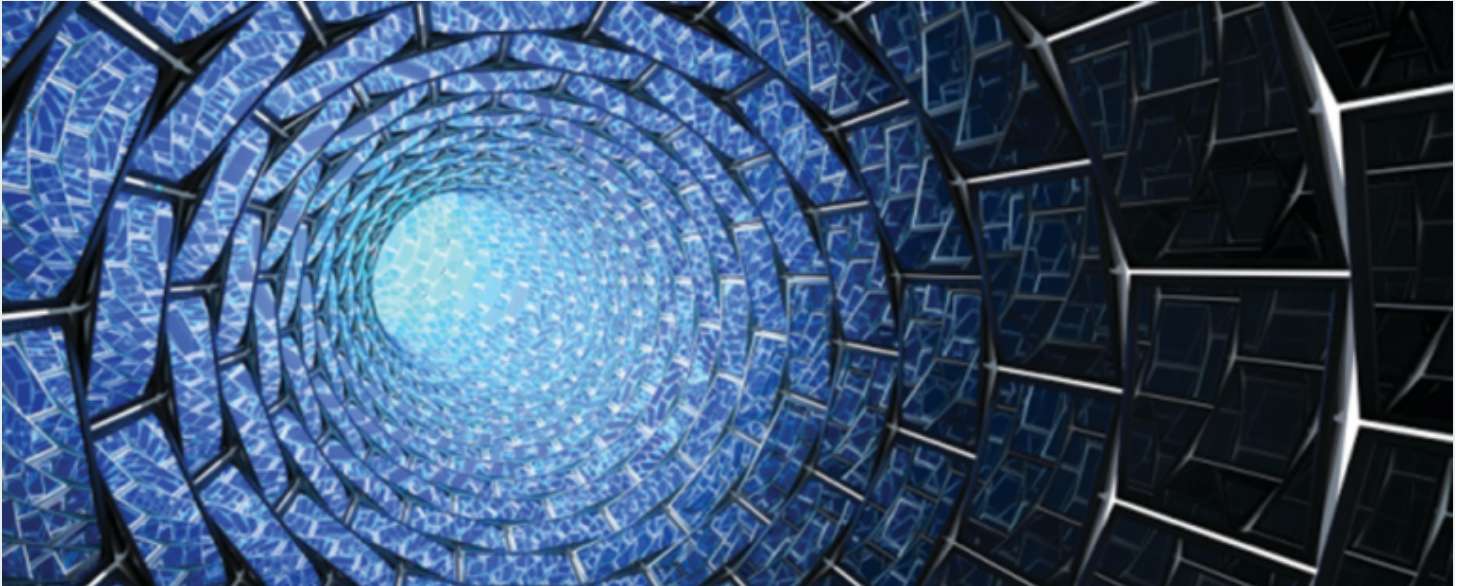


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and businesses of all types communicated with their clients and internally. I'm not even sure how to account for the amazing amount of time saved and the resulting increased

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Not that long ago, a new technology dramatically changed the way accounting firms and businesses of all types communicated with their clients and internally. I'm not even sure how to account for the amazing amount of time saved and the resulting increased productivity that email gave to professional firms.

Yes, boring old email. While few people use the term "amazing" when speaking about email anymore, the changes that it led to were incredible. Virtually instant communication with clients and being able to respond to their emails at any time of day or night; A streamlining of internal office communications between staff; and even the documenting of communications performed via email.

To this day, I can't really remember how professional life was back then, aside from

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incident in some states.

Client portals, which have now been available for accounting firms for about a decade and are also sometimes called file sharing websites or online folders, provide a solution to these security risks, as well as many additional features that have grown to include numerous productivity-enhancing tools.

Basic features of these online collaboration centers include the ability for both the firm and a client to upload a file of almost any kind and size into a secure online dropbox, where the other party can access it. Clients can send source documents, firms can send their clients their finalized income tax return or leave it in there, so the client can use it anytime they want.

More advanced features in some of the portal systems designed for accounting firms include tracking of when a client viewed a document, scheduled document deletion, and integration with tax and accounting systems and practice management programs. The benefits of portals extend to virtually all of the services that firms provide, from write-up to payroll.

— 2014 Reviews of Client Portals for Tax & Accounting Firms —

- CCH ProSystem *fx* Portals
- ShareFile by Citrix
- SmarVault Client Portals
- Thomson Reuters NetClient CS Portals

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A few even allow the firm to offer online versions of common business software to

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Almost all client portal systems designed for accounting firms and their clients have customization features that let the firm brand the client-facing portal website with their own logos and website color screens. In this way, clients who visit the firm's website are offered a login, generally from the homepage, from which they then can access their files and other information in the portal. And while maintaining the firm's branding and relationship.

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