

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

apps available to help the small business run more smoothly and effectively.

Gail Perry • Jun. 19, 2015



Accounting firms are always looking for ways to help their small business clients, and many accounting firms are small businesses themselves. There are plenty of cool apps available to help the small business run more smoothly and effectively. We asked members of the *CPA Practice Advisor* audience and family to share some of their favorite organizational apps and this is what we learned.

Sandra Wiley, COO at Boomer Consulting, recommends *WORKetc*, a CRM tool that also helps with project management, billing, and team collaboration.

Barry Melancon, CPA, CGMA, president and CEO of the AICPA, uses the electronic signature solution CudaSign (formerly *Sign Now*). “I’ve signed many documents with

this tool and also it's good where multiple signatures are needed.”

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

web and social networks to help you find common ground about people. “I like it for preparing a dossier on people you are meeting with, plus the virtual collaboration tools like dropbox, google drive, etc.”

Brian Tankersley, CPA, CITP, accounting consultant, and director of strategic relationships for K2 Enterprises, recommends *Office Remote*, an app that turns your phone into a smart remote tool that interacts with Microsoft Office on your computer. “Remote allows you to use your phone as a bluetooth remote with PowerPoint and other Microsoft Office apps.”

John Higgins also recommends *GoodReader* which he uses on his iPad. “This is a PDF document viewer that allows me to view AND annotate all of my pdf files anytime, anywhere. All CPAs should make this type of an app mandatory. The ability to work with PDF files on a tablet makes ‘going paperless’ a whole lot easier and more practical.”

Gary Boomer, CPA, CITP, CEO of Boomer Consulting, recommends *Bill.com*. “It’s a huge time saver and I don’t understand why every firm isn’t using it and recommending it to their clients. It organizes the entire bill payment process including controls over invoice approval and bill payment even from a mobile device. It also has a receivables component utilizing ACH rather than CC payments. It is an entrepreneur and controller’s dream.”

“Apps We Love” is sponsored by [AccountantsWorld](#):

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us