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are and with no regard for your firm's digital capabilities. To meet those demands and most importantly, to deliver or exchange documents in a secure manner ...

Don Emery • Sep. 07, 2016



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accountants and tax professionals have caught on to the value of Web portals. For those who have not yet adopted Web portal technology, regular email will not suffice; it does not provide adequate security when transferring documents.

Two major functions of Web portals

The two major functions of Web portals, they are used to exchange files and to post files for access and recovery at a future date. Exchanging files may include sending QuickBooks backup files back and forth, or engagement letters needing to be signed. Using a Web portal for these matters allows the firm to set retention parameters on the documents being exchanged. For the exchange of QuickBooks backup files, there may be a 30-day retention period set. When posting financial statements or tax returns in the client's Web portal, you might set retention timeline of three to four years, ensuring when files are needed into the future, they can be easily accessed by the client or firm.

Once a Web portal is set up, one of the few places where firm's run into trouble is when they do not allow the client to manage their own password. If clients are having trouble with login, giving them the ability to change their password helps to ensure they are not calling the accountant for an administrative task such as password help.

Required features of Web portals

There are several required features when shopping for Web portal technology. Investigate Web portal technology to ensure it has the following features:

- Usage of the Web portal needs to be simple. Clients need to easily be able to upload and download documents or they will not use it.

- There needs to be access to multiple entities from one login. (i.e. individual,

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Don Emery, CPA, CA is Doc.It's Director of Client Solutions. Doc.It provides [document management, workflow and document storage software](#) for accounting firms. Don leads the North America business development team. He provides implementation consulting services to clients and assists clients with various issues. Don joined Doc.It in 2009 as an Implementation Specialist and was named Director of Client Solutions in 2012.

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