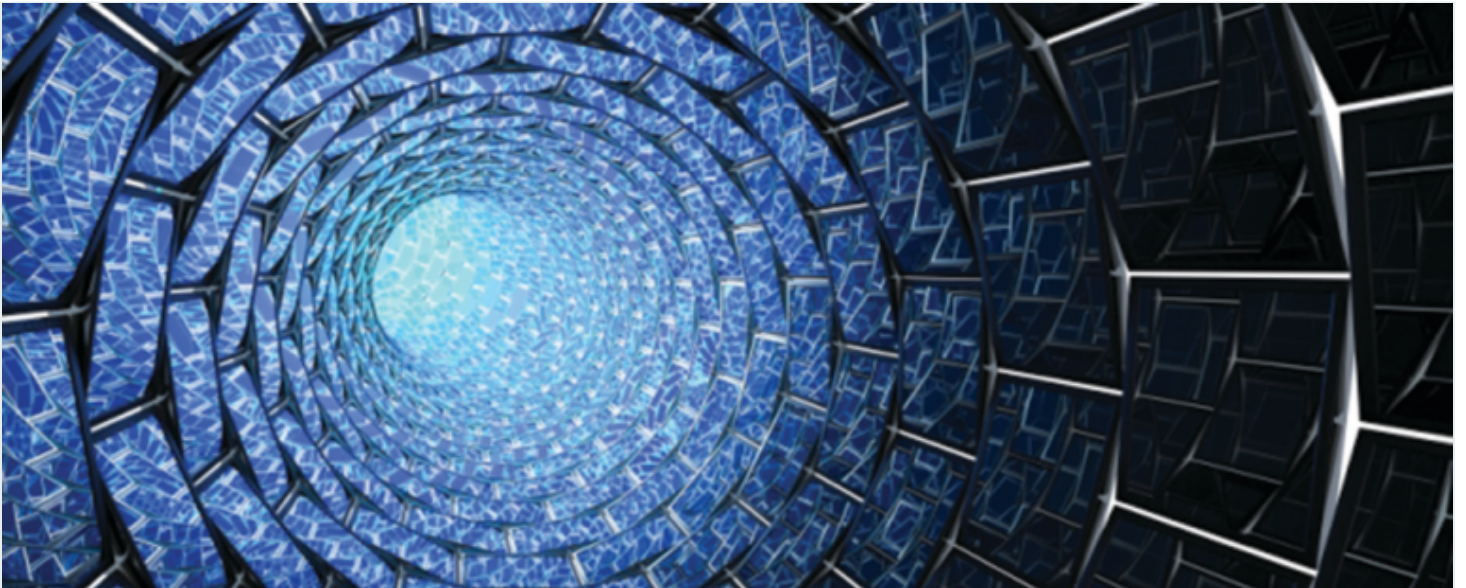


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tasks, online portals are becoming an effective method of sharing and exchanging files and information. They support two-way communications in a simple, secure format ...

**Nathan Mote** • Oct. 20, 2016



As more people of all ages rely on mobile apps and devices to manage their daily tasks, online portals are becoming an effective method of sharing and exchanging files and information. They support two-way communications in a simple, secure format between a firm and its clients.

Within the accounting industry, clients have come to expect on-demand access to their financial documents, and an online portal environments, ensure these needs are met in a simple and secure format. The benefits of portal environments also extend to the business – they incorporate software solutions that simplify workflows, foster a flexible work environment, and cut down wait times making customer service and support efficient and effective while firms gain productivity.

By eliminating these distractions, CPAs can focus their time and efforts on helping

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With a portal environment, businesses stay productive by collaborating on projects from anywhere, updating documents in real time, and securely sharing files with colleagues in order to meet deadlines and provide great customer service.

The ease of a flexible work environment also extends to clients. With a portal, they can access integrated technology that enables them to review and sign documents from any mobile device. This means decisions can be made without needing to meet in person.

## **Simplified management**

Desktops often become a cluttered mess and navigating between documents and program shortcuts can become a frustrating experience. With online portals, CPAs and their clients gain a simple and organized way to manage their information. In addition to having a central location where they can access and collaborate on their documents, online portals can be easily integrated with other tools such as QuickBooks, providing users with a full suite of apps within easy reach.

## **Easy transmission of signatures without compromising integrity**

How much time and money is spent coordinating logistics with clients to sign important documents? The back and forth between a business and client to determine a time to meet, along with travel to and from the meeting, costs both parties. With an e-signature solution integrated into a secure portal environment, clients can sign and finalize their paperwork in one place – all electronically. Businesses don't need to waste paper and ink and clients know their needs are being met in a timely and efficient manner.

## **Benefits of going paperless**

Going paperless should be a no-brainer. By moving work and transactions to the

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rules official.

In addition to time and money savings, businesses can also track who has access to these digital documents so that clients know that their confidential information remains secure.

## Improved customer service

Like all small and medium sized businesses, CPAs rely on the satisfaction of their customers. To compete with large enterprises, small accounting firms need to leverage technology to improve customer experience.

Portals cut down on the wait time for the transmission of documents between a business and its customer. Clients know their needs are being addressed in an efficient and effective manner, as they can ask questions immediately and provide signatures from any mobile device.

A flexible, mobile and secure work environment also frees up time for CPAs, allowing them to refocus more time on improving processes. For example, with Bruce Broman's increased free time, he was able to create an annual webinar for customers to learn more about their tax files and accounting working with Broman Accounting.

Moving to a portal environment is something all small and medium sized accounting firms should consider, as both employees and customers demonstrate increased satisfaction with the ease of sharing documents and delivering on contracts. At the end of the day, it is a win-win situation for both the business and customer. And who couldn't use a little extra time in the day?

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Nathan Mote is a product marketing manager at Citrix [ShareFile](#).

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