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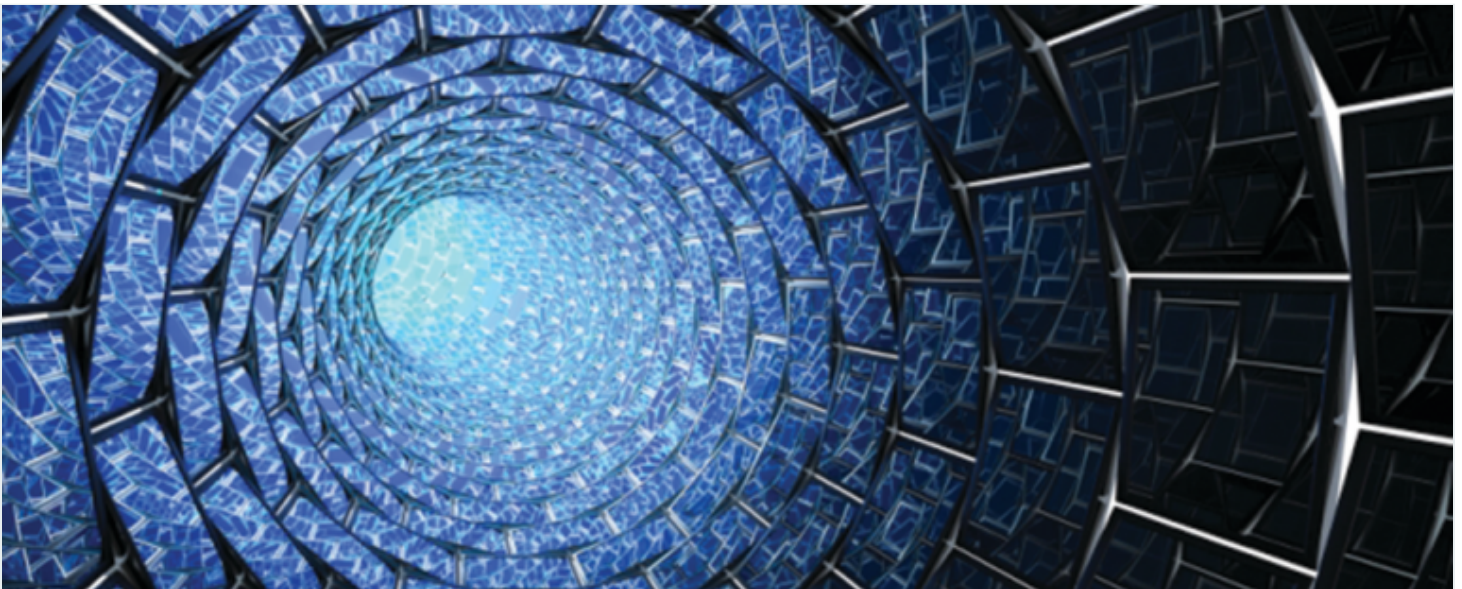
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FIRM MANAGEMENT

2016 Review of Client Portals for Accounting Firms

Although accounting firms have typically used email to send files to their clients, stricter confidentiality requirements and difficulty in transmitting large files have made email usage difficult, if not impossible in most situations. Portals offer a ...

Mary Girsch-Bock • Nov. 17, 2016



According to the [3rd Annual Accounting Firm Operations and Technology Survey](#), accountants and tax professionals are using portals more than ever before. The survey notes a significant jump in portal usage: from 52 percent in 2014 to 75 percent using portals today.

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If you're part of the 75 percent, that's great. But if you're looking to start using a portal in your practice, or maybe you're already using one but would like to explore other options, this review is for you.

If you need further convincing, consider this:

- The use of a portal can increase firm flexibility, allowing users to easily share documents, not just with clients, but with colleagues as well.
- Portals can allow your firm to easily create a better customer service environment. Clients can easily download confidential documents at their leisure, review, sign, and upload the signed document to the portal – all without cumbersome emails, or worse, printed documents that need to be mailed.
- Using portals helps to guard sensitive information. Web portals securely encrypt all data, so accounting firms can be assured that client information is handled in a secure manner, while clients don't have to worry about unauthorized access to lost documents in the mail.
- Portals can handle large files just as easily as smaller ones.
- Portals are not reserved for large accounting firms. Even firms with a staff of five will reap the benefits of using a portal, while also remaining competitive with larger firms.
- Client portals can also be useful for firms offering payroll and other related services to their clients; providing both clients and client employees with the ability to access payroll information such as paystubs and W-2's online.

When examining various portals, it's important to keep some things in mind, such as the product's **ease of use**, which we examine in the review. Remember, your employees and your client's will be loath to use the portal if it requires specialized knowledge, or something more complicated than a simple login. Another area that we take a look at is **support**. Firm owners will want to be sure that adequate training and support options are available for the product that they choose, including product setup and initial training.

Aside from the ability to exchange documents safely and securely, many client portals offer additional features and functionality, such as integration with document management systems, the ability to email a client when a document has been placed

in the portal, and the ability to offer seamless integration with numerous tax and accounting applications.

Click to see the reviews of these client portal systems:

- [AccountantsWorld](#)
- [CCH Axxess Portal](#)
- [Citrix ShareFile](#)
- [SmartVault](#)
- [Thomson Reuters NetClient CS](#)

All of the products reviewed in this issue offer a free trial, so users can try the products out at their leisure.

If continuing to offer your clients the best customer service possible is one of your firm's goals, a client portal can go a long way towards helping you reach that goal.

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