## **CPA**

## Practice **Advisor**

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Gail Perry • Dec. 19, 2016



We like lists. It goes with the territory of keeping track of numbers and transactions and all the moving pieces of our and our clients' businesses. As we approach the end

of the year, resolutions to be more efficient and organized are often on our minds. To

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are limited to 25 tasks. The Verge calls Wunderlist, "The best to-list app,"

If you need more than a program just for yourself, consider **Asana**, a free app that can be used for teams of up to 15 people. The app is designed for managing team workflows and tasks. Ranked 4.5 out of 5 stars by *PC Magazine*, Asana is best used for tracking daily tasks, and the program includes the ability to give status updates. The app includes the ability to assign due dates and responsible people, and you can add comments and upload files. There are basic dashboards, and you can connect to other tools including Slack and Dropbox, all for free. There is a premium version available which allows for an unlimited number of users, customization, and several other advance controls.

Stored lists for repeated use can find a home in **Google Keep**, a free app designed to save your reading lists, music, anniversary and birthday and other important dates – basically the daily stuff that used to find a place on a Post-It note, can now be easily set up in Keep, which PC Mag's editors gave a 2.5 star rating. It also has voice recording and can remind users of tasks or shopping lists when they are near a store or task location. A feature also lets users share their thought lists with their family and friends.

**Evernote** is, perhaps, the most famous of the list/note apps on the market. With a 4.5 star rating from CNET, the app lets users create and sync notes, lists web pages and audio from their mobile devices and desktop or laptops, providing numerous formatting, organization and upgrade options. The app even recognizes handwritten scanned in notes.

For Basecamp users, the **Workstak** add-on offers client and task management for professionals, as well as tools for project tracking, invoice generation, calendaring, time tracking and digital document management. The system also pushes notifications to the user about pending approvals and tasks. A free version is

available for a single user, but the app can support virtually any number of users and

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management utilities, task management and staff utilization. It also incorporates digital document management, time tracking, receipt-photo expense management, and has a social platform with news feeds and chat functions. CNET editors give it 4 stars out of 5.

For power users of Microsoft Office, **OneNote** lets them easily take notes, plans and lists, along with images or audio, and then can sync them across multiple devices, or share them with coworkers or friends. PCMag readers gave the app 4 stars.

For users who just want a simple note or list making app, without all of the multiuser functions and management features, **Simplenote** fits the bill. The easy to use app offers search, as well as tags and pins. It includes reminders and users can send lists to email. iTunes users give it 4 stars.

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