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and profitable in their own firms, as well as the tech tools and programs that help their ...

Isaac M. O'Bannon • Feb. 20, 2018



Accounting and tax firms often have a self-impression that they are behind the curve when it comes to technology, but they are often near the forefront. Their role as advisors to their clients, especially business owners, further extends their

technological importance, as they impact many of the technology decisions their

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## 2018 CPA Practice Advisor Readers' Choice Award Results

### IN-FIRM TECHNOLOGIES

#### Federal/State Income Tax Preparation

**Insight:** More than 90 percent of our Readers Choice voters report using or recommending professional tax systems, making this our most popular category. Drake Software has consistently dominated this and other tax-related questions in the annual awards. Drake has about 10% of the professional tax software market, but has a very active and loyal customer base who support the product and company.

#### WINNER: Drake Software (59%)

#### Runners Up:

- Intuit Lacerte, ProSeries, TaxOnline (14%)
- Thomson Reuters UltraTax or GoSystem RS (7%)
- Wolters Kluwer CCH Small Firm Services ATX or TaxWise (6.5%)
- Wolters Kluwer CCH Axcess or ProSystem *fx* (4%)
- TaxAct Preparers' Editions (3.5%)
- RCS TaxSlayer Pro (2%)
- Other (4%)

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#### Specialty Systems & Tax Prep Tools

**Insight:** Professionals often turn to specialty systems to fill the needs of specific clients. These often help prepare less common forms, help streamline tax workflow, cover areas their main tax system doesn't, or go into greater detail.

## WINNER: QuickBooks Self-Employed (33%)

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- Sageworks Electronic Tax Return Reader (1.5%)
- DynaTax (1%)
- Other (6.5%)

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### Tax Planning Systems

**Insight:** Tax planning should get a huge boost this year, with the passage of the Tax Cuts and Jobs Act, the major new tax reform law. Because tax planning is proactive, tax pros can help identify potential issues that result in direct, identifiable tax savings that clients see and appreciate. As such, tax planning systems go far beyond what tax preparation systems can do when it comes to creating hypothetical situations based on current and projected tax law, phase-ins and outs, and life event changes such as variations in income, college and other family matters. Once again, Drake's active user base showed up in force for this question.

## WINNER: Drake Tax Planner (69%)

Runners Up:

- Intuit Lacerte Tax Planner (9%)
- Thomson Reuters Planner CS (5%)
- Wolters Kluwer CCH ProSystem *fx* Planning and *fx* for Small Firms (4.5%)
- Thomson Reuters Checkpoint Individual Business 3.5%
- Bloomberg BNA Income Tax Planner (3.5%)
- Other: 5.5%

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### Tax & Accounting Research Systems

**Insight:** Taxes are complex enough, and with the uncertainty of the new tax reform law, professionals need a reliable tool for finding the information they need. This includes primary source material such as the federal tax code and state tax laws, as

well as tax court rulings and expert analysis of these materials. Some of the available

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- CCH IntelliConnect (Wolters Kluwer) (5%)
- Intuit Tax Research & TaxAlmanac.org (4%)
- Parker Tax Pro Library (3.5%)
- Tax Talk Today (3.5%)
- TaxSpeaker (3%)
- Bloomberg BNA Financial (2%)
- Other: 1%

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## 1099/W-2 Compliance

**Insight:** Specialty W-2 and 1099 preparation systems help relieve much of the burden of processing hundreds or more forms each year, and streamline the entire process, including mailing of copies to recipients and federal and state agencies. Drake's Client Write-Up won this year's voting, with its integrated W-2 and 1099 compliance functions.

## WINNER: Drake Client Write-Up (46%)

Runners Up:

- AMS 1099-ETC (14%)
- W2/1099 (Wolters Kluwer ATX and TaxWise) (11%)
- Thomson Reuters Accounting CS Payroll Compliance (8%)
- Tenenz Laser Link/EagleView (4.5%)
- 1099 Pro (3%)
- Greatland/Yearli (2%)
- AccountantsWorld ATF Payroll (1.5%)
- Real Business Solutions W2-Mate (1.5%)
- Others (8.5%)

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the sales tax functions built into their (or their clients') accounting systems. Among the votes for specific sales tax software, the results were:

**WINNER: Vertex Indirect Tax (35%)**

Runners Up:

- eFileSalesTax.com (17%)
  - CFS Tax Software (13%)
  - Avalara AvaTax or Trustfile (11%)
  - CCH Wolters Kluwer (SureTax/SalesTaxOffice/SalesTaxSaaS/STRO) 9%
  - Thomson Reuters ONESource Indirect Tax (5%)
  - BNA Sales Tax Rates (2%)
  - Other (8%)
- 

**Sales & Use Tax Exemption Certificate Management**

**Insight:** Another specialty area, managing exemption certificates is a critical function for many retailers and especially for wholesalers, since poor management can open them up to sales tax compliance failures, and substantial penalties.

**WINNER: Vertex Exemption Certificate Manager (63%)**

Runners Up:

- Thomson Reuters ONESOURCE Exemption Cert. Manager (20%)
- Avalara AvaTax CertCapture (14%)
- Sovos (formerly Imaging Science Services) 3%

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- Drake Client Write-Up (36%)
- Thomson Reuters Accounting CS (4%)
- Sage One/Sage 50/Peachtree (3%)
- PC Software Accounting Inc. (2%)
- Xero (2%)
- AccountantsWorld Accounting Power (1%)
- Client Accounting Suite (Wolters Kluwer) (1%)
- CYMA After-the-Fact Module (0.5%)
- Other (0.5%)

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### **Audit Engagement Tools**

**Insight:** Managing audit engagements can be cumbersome if not using the right tools, which streamline these functions and provide greater controls on the processes. About 10 percent of this year's voters selected a preference in this category:

**WINNER: Thomson Reuters PPC SMART Audit Suite & WorkPapers CS (35%)**

Runners Up:

- Wolters Kluwer CCH ProSystem *fx* Systems and ARM (27%)
- Audit Confirmations (9%)
- Capital Confirmation (7%)
- Wiley Advantage Audit (6.5%)
- AuditFile (6%)
- CaseWare IDEA (4%)
- Audit Dashboard Automated PBC (2%)
- Rivio Clearinghouse (1.5%)
- Other (2%)

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out of payroll, making it much easier to keep employees and clients happy, and the state and federal agencies satisfied with reporting and remission of payroll taxes.

**WINNER: Intuit QuickBooks Payroll, Enhanced Payroll & Full Service Payroll (41%)**

Runners Up:

- Drake Client Write-Up/Payroll (23%)
- ADP Payroll Solutions (13%)
- Paychex (7%)
- Thomson Reuters Accounting CS Payroll or myPay (4%)
- AMS 1099-Etc Payroll (3%)
- PC Software Accounting Inc. (2%)
- Gusto (formerly ZenPayroll) (2%)
- AccountantsWorld Payroll Relief (1.5%)
- Wolters Kluwer Payroll Compliance Reporting (1%)
- Other (2.5%)

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## Business Valuation

**Insight:** Although a specialty niche, valuation services, and the software that helps professionals provide the services, are highly valued.

**WINNER: SageWorks Valuation Solution (30%)**

Runners Up:

- MoneySoft Corporate Valuation Pro, DealSense & Business Valuation Specialist (25%)
- ValuSource Pro, BVM Pro & Express Business Valuation (22%)

- Other (23%)

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and include advanced workflow management.

### **Practice Management:**

**WINNER: Thomson Reuters Practice CS (32%)**

Runners Up:

- Sage Timeslips (20.5%)
- OfficeTools WorkSpace by AbacusNext (17%)
- Wolters Kluwer CCH Axcess, CCH iFirm & CCH ProSystem fx Practice Mgmt. (15%)  
AccountantsWorld Practice Relief (7%)
- ClientWhys/TaxBuzz.com (3.5%)
- Other (5%)

### **Time & Billing:**

**WINNER: TPS Software (34%)**

Runners Up:

- TSheets (28%)
  - ImagineTime (18%)
  - BQE BillQuick (9%)
  - ClientWhys/TaxBuzz.com (5%)
  - BigTime (2%)
  - Bill4Time (1.5%)
  - Other (2.5%)
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- ReceiptBank (3%)
- Zoho Books (1%)
- FreshBooks (0.5%)
- CollBox (0.5%)
- Other (2%)

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### Client Portals

**Insight:** Now that we almost live in the cloud, it's much easier and more efficient for firms and clients to electronically share documents and data. Drake once again dominated this year's voting in this category. Surprisingly, however, about half of all respondents said they do not use a portal system. If your firm is sending documents via email, you may be breaking your state's privacy laws and could face severe fines. Not to mention you are putting your clients' data at risk. Of those voters who did select a preferred portal system, the results were:

**WINNER: Drake Software SecureFilePro.com (70%)**

Runners Up:

- Citrix ShareFile (9%)
- Wolters Kluwer CCH Axcess Portal/ProSystem *fx* / iFirm (4.5%)
- Thomson Reuters NetClient CS Portals or Onvio (4%)
- eFileCabinet – SecureDrawer (3%)
- AccountantsWorld Cloud Cabinet (2%)
- ClientWhys/TaxBuzz.com (2%)
- OfficeTools by AbacusNext (1.5%)
- SmartVault (1%)
- Other (3%)

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- Intuit ProSeries & Lacerte DMS (18%)
- Thomson Reuters FileCabinet CS/GoFileRoom (13%)
- eFileCabinet (7%)
- CCH Axcess or ProSystem *fx* Document (6.5%)
- SmartVault Document Storage (4%)
- OfficeTools WorkSpace by AbacusNext (2.5%)
- Doc.IT (2%)
- AccountantsWorld Cloud Cabinet (1%)
- Other (3%)

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## Document Management Utilities

**Insight:** Many firms use specialty hardware for scanning and optical character recognition functions, faxing and other features. These systems often work directly with document management systems.

### WINNER: Fujitsu (39%)

Runners Up:

- HP (28%)
- Canon (14%)
- Nuance (7.5%)
- cPaperless Tic-Tie-Calculatate (6%)
- ABBYY (3%)
- Kofax (2%)

- Other (0.5%)

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- Other (3%)

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## Comprehensive Firm Workflow Systems

**Insight:** This category is divided into two groups: Comprehensive Workflow, and Other Workflow Tools, which are designed for aiding in specific tasks and engagements and for smaller firms.

### Comprehensive Workflow

**WINNER: Thomson Reuters Practice CS Project Management (21%)**

Runners Up:

- OfficeTools WorkSpace by AbacusNext (17%)
- TaxWorkFlow (16%)
- XCM Workflow (13%)
- Wolters Kluwer CCH Axxess Workstream (9%)
- Wolters Kluwer CCH iFirm Practice Manager (8.5%)
- Thomson Reuters FirmFlow (7%)
- Pascal Workflow (5.5%)
- Autonomy iManage Workflow Manager (3%)

### Other Workflow Tools:

**WINNER: GruntWorx (30%)**

Runners Up:

- Intuit Tax Import for Lacerte and ProSeries (12%)
- Wolters Kluwer CCH ProSystem *fx* Systems (8%)
- ATX and TaxWise (Wolters Kluwer) (7%)

- Thomson Reuters GoFileRoom/Practice CS/Workpapers CS (6.5%)

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## Website Builders & Services for Accounting Firms

**Insight:** There are many tools out there that are affordable and make it easy to create (and maintain) a professional website for your firm.

### **WINNER: Drake SiteDart Website Services (41%)**

Runners Up:

- GetNetSet (20%)
  - CPA Site Solutions (11%)
  - Thomson Reuters Web Builder CS (7%)
  - Tenenz AFSB (5%)
  - AccountantsWorld Website Relief (3.5%)
  - ClientWhys/TaxBuzz.com (3.5%)
  - Wolters Kluwer CCH ProSystem *fx* SiteBuilder (3%)
  - Build Your Firm (2%)
  - CPASites.com (2%)
  - Rootworks (1%)
  - NMGI WebCare (1%)
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# SMALL BUSINESS ACCOUNTING SYSTEMS

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- PC Software Accounting Inc. (2%)
- Other (2%)

## Online Small Business Accounting

**WINNER: Intuit QuickBooks Online/Online Accountant (83%)**

Runners Up:

- Thomson Reuters Client CS or CS Client Access (6%)
- SageOne (4%)
- Xero (3.5%)
- AccountantsWorld Accounting Power (1%)
- FreshBooks (1%)
- NetSuite (1%)
- Other (0.5%)

## Expense and Travel Management Solutions

**WINNER: Expensify (30%)**

Runners Up:

- Concur Expense (27%)
- ReceiptBank (13.5%)
- Certify (13%)
- ExpenseWatch (5.5%)
- Tallie (5%)
- ZohoExpense (4%)
- SpringAhead (1%)
- Other (1%)

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- Wasp Barcode (1%)
- Other (2.5%)

### **Not-for-Profit Accounting**

**WINNER: Intuit QuickBooks Premier Nonprofit (89%)**

Runners Up:

- Blackbaud Financial Edge or Fundware (3%)
- Aplos Software (2.5%)
- Cougar Mountain FUND (1.5%)
- CYMA (1%)
- Abila (1%)
- OneNFP for Nonprofits (1%)
- Open Systems TRAVERSE (0.5%)
- Other (1%)

### **Fixed Asset Management**

**WINNER: Intuit ProSeries Fixed Asset Manager (41%)**

Runners Up:

- Thomson Reuters Fixed Assets CS (25%)
- Wolters Kluwer CCH ProSystem *fx* Fixed Assets & Fixed Asset Manager (14%)
- Sage FAS Asset Accounting (8%)
- Pro-Ware Asset Keeper (5.5%)
- BNA Fixed Assets (5%)
- Open Systems TRAVERSE (1%)
- Other 0(.5%)

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#### Runners Up:

- Thomson Reuters Virtual Office CS/SaaS (9%)
  - Xcentric (8%)
  - Right Networks (6%)
  - AbacusNext Private Cloud and Cloudnine Realtime (4.5%)
  - Other (2.5%)
- 

#### Outsourced Technology Services

**WINNER: Xcentric (34.5%)**

#### Runners Up:

- Cloudnine Realtime by AbacusNext (21%)
  - AppRiver (12%)
  - Right Networks (10%)
  - Network Management Group Inc. (6%)
  - InsynQ/CPAASP (6%)
  - CPA2Biz Email Solutions (4%)
  - Cetrom (2%)
  - Other (4.5%)
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#### Laptop and Desktop Computers

**WINNER: Dell (31.5%)**

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### Smart Phone Operating System

- Android (49%)
- Apple (45%)
- Microsoft (4.5%)
- Blackberry (0.5%)
- Other (2%)

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### Smart Phone Brand

- Apple (44%)
- Samsung (21%)
- Motorola (10%)
- LG (7%)
- HTC (6%)
- Microsoft (5%)
- Other (7%)

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### Tablet Computers/Devices

- Apple iPad 44%
- Samsung 18%
- Kindle 10%

- Motorola (6%)

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**Insight:** Printers are needed even in the “paperless” office.

- HP 41%
- Brother 21%
- Canon 11%
- Fujitsu 9%
- Epson 6%
- Dell 3.5%
- Other 8.5%

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## Office Supply Store

- Staples 27.97%
- Office Max/Depot 27.42%
- Costco 10.5%
- Sam's 9%
- Wal-Mart 8.5%
- Best Buy 8%
- Quill 6.5%
- FedEx Office 1%
- Others 1.11%

(\* We provided two decimal points on this category to show how close the voting was.)

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- Bicycling (7.5%)
- Aerobics (7%)
- Yoga (6%)
- Team Sports (2%)
- Racket Sports (1.5%)

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## Technologies for Professional Firms

**Do you use smartphone or tablet apps designed specifically for tax and accounting professionals?**

- Yes 15%
- No 85%

**How “remote” are you? How many hours per week do you work on client engagements or firm business while away from the office (at a client, at home or anywhere else)?**

1. “My office is my home:” 42%
2. Less than 1 hour: 17.5%
3. Between 1-4 hours: 12.5%
4. Between 5-9 hours: 8.5%
5. Between 10-14 hours: 5%
6. 15+ hours per week: 14.5%

**How “social” are you? Which social media tools do you use in conjunction with your work?** About half of our voters said they don't use any social media tools for business purposes. Of those who do, the breakdown is as follows:

- Facebook 31.5%

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Thank you to the nearly 5,000 tax and accounting professionals who participated in this year's Readers' Choice Awards.

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