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FIRM MANAGEMENT

2018 Review of CPA Site Solutions

Mary Girsch-Bock • Oct. 15, 2018



CPA Site Solutions

www.cpasitesolutions.com

From the Oct. **2018 reviews of Website Builders** for accounting firms.

CPA Site Solutions is well suited for accounting firms of any size; offering scalable website design and hosting solutions. CPA Site Solutions currently offers four plans, with complete web design included in all plans.

While the Silver plan offers 78 ready-to-go website templates, the Gold, Platinum, and Diamond plans offer up to 250 designs to choose from. Firms can choose to use the designs as they are presented or customize the design using the Site Manager function available in the application. For those that are looking for a more hands-off approach, CPA Site Solutions also has web designers on staff that can customize the template to suit the needs of any firm.

CPA Site Solutions offers nine home page design options, and the Gold, Platinum, and Diamond plans also offer a completely customized home page. The product also offers up to 29 standard site designs to choose from, and smart website design options are available for those that want a completely mobile friendly website. CPA Site Solutions offers 67 pages of content, tools, and images that can be used immediately or customized to suit the needs of the firm. Users can also add additional custom pages to their website, with the product supporting up to 1,000 pages of content. This method allows users to be up and running quickly, while also having the option to customize any or all of the pages on an as-needed basis.

The Tax Organizer is an interactive application that allows clients to enter tax data, with the ability to return to the organizer to add additional information as it becomes available. The organizer supports up to 10,000 clients and 200 organizers per client. Other features available to promote client interaction include a Real Time Stock Market Widget, Current Tax Rates, Tax Due Date Calendar, links to Tax Forms and Publications, and an Internet Links page. CPA Site Solutions also includes more than 3,000 pages of financial guidance reports, all written by accounting professionals and designed to help clients with numerous life events, investment solutions, and tax changes.

CPA Site Solutions offers a variety of domain management resources, including the ability to map multiple domains to a single web address. Domain name registration, transfer, and renewal service is also offered, with each firm receiving 10 email addresses, with additional emails available for an additional charge.

Users can choose to utilize the default slideshow for their homepage or utilize CPA Site Solutions personnel to create a custom slide show for the home page. The Site Manager allows users to easily make any changes to their website by simply choosing the page and then the item that needs to be edited. Users can utilize the Site Manager to add or delete content or even complete pages if desired.

CPA Site Solutions offers good Search Engine Optimization (SEO) capability, including the ability to customize tags and codes to improve search results. Custom designed landing pages are available, and the website is indexed by popular search engines such as Google, Yahoo, and Bing. Additional SEO functionality is also available at a low monthly rate, as is a Pay-per-Click option. The product also offers easy integration with social media sites such as Facebook, Twitter, and LinkedIn, with additional social media management available as an add-on option.

Users can easily create a blog using WordPress, which is available in both the Platinum and the Diamond plans. A secure client portal feature is also included in CPA Site Solutions, with the ability to securely send and receive client files. A document storage option is also available on the portal as well, with 5GB of storage available in the Silver plan, with the Diamond plan offering unlimited storage. Other handy features include an interactive map, a complete email marketing solution, and the ability to accept credit card payments on the website.

CPA Site Solutions Help Center offers access to a variety of tools and resources including a Getting Started option that guides new users through everything from initial login information to site modifications and design changes. Users can also access the Email Marketing System, Tax Organizer, Add-on Tools, and view FAQs. Gold, Platinum, and Diamond plans offer unlimited toll-free telephone support, and chat support.

CPA Site Solutions is one of the most comprehensive website building applications on the market today. Designed for firms of any size, the product offers a variety of options, plans, and features that would be difficult to beat. CPA Site Solutions offers four plan options: Silver, which is priced at \$58.50 per month, Gold, which is \$79.50, Platinum, which is \$105.50, and Diamond, which is \$139 per month. version is \$102.50. No long-term contract is required, and a 60-day free trial is available.

2018 Rating 5 Stars

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