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LIKE MOST

This is the 15th annual edition of the Readers' Choice Awards. Once again, we have invited our readers to help us spotlight the technologies they most respect and trust to help them run their firms and provide client services.

Isaac M. O'Bannon • Apr. 16, 2019



Technology continues to impact every aspect of the modern public accounting practice, requiring firms and professionals to constantly evolve their processes and workflows, and continually reinvent their firms. For nearly 30 years, *CPA Practice Advisor* has covered the continuing impact of technology.

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Thank you to the more than 4,300 readers who participated in voting this year. Now, on to the results!

IN-FIRM TECHNOLOGIES

Federal/State Income Tax Preparation

Insight: Nearly all of this year's 4,300 Readers Choice voters reported 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 a very active and loyal customer base that supports the company and its products.

WINNER: Drake Software (38.2%)

Runners Up:

- Intuit Lacerte, ProSeries or TaxOnline (27%)
- Wolters Kluwer CCH Small Firm Services ATX or TaxWise (10.9%)
- Thomson Reuters UltraTax or GoSystem RS (10.1%)
- TaxAct Preparers' Editions (5.4%)
- Wolters Kluwer CCH Axcess or ProSystem *fx* (5%)
- RCS TaxSlayer Pro (2.8%)
- Other (0.6%)

Specialty Systems & Tax Prep Tools

Insight: Some professionals turn to specialty systems to fill the needs of specific clients. These systems are used to help prepare less common forms, help

streamline tax workflow, or cover areas their primary tax prep system doesn't.

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- Bloomberg Tax 707 & 708 Preparer (2.7%)
- SurePrep 1040SCAN & TaxCaddy (2%)
- Xero Tax Touch (1%)
- DynaTax (1%)

Tax Planning Systems

Insight: Tax planning is increasingly valuable to clients, particularly since passage of the Tax Cuts and Jobs Act. Proactive tax planning can help identify potential issues that result in direct, identifiable tax savings that clients see and appreciate. These 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.

WINNER: Drake Tax Planner (52%)

Runners Up:

- Intuit Lacerte Tax Planner (21%)
- Thomson Reuters Checkpoint or Planner CS (14.8%)
- Wolters Kluwer CCH ProSystem *fx* Planning and *fx* for Small Firms (7.8%)
- Bloomberg Tax Income Tax Planner (4.4%)

Tax & Accounting Research Systems

Insight: Tax research remains an essential tool for tax professionals. 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 tax

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- Thomson Reuters Checkpoint (RIA) (4%)
- TaxSpeaker (3%)
- CCH IntelliConnect (Wolters Kluwer) (2.5%)
- Parker Tax Pro Library (2%)
- Intuit Tax Research & TaxAlmanac.org (1.5%)
- Tax Talk Today (1%)
- Bloomberg Tax Financial (1%)

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 (32%)

Runners Up:

- Thomson Reuters Accounting CS Payroll Compliance (12%)
- W2/1099 (Wolters Kluwer ATX and TaxWise) (11%)
- Tenenz Laser Link/EagleView (8.4%)
- AMS 1099-ETC (7.2%)
- Greatland/Yearli 6.2%)
- eFile4Biz (6%)
- 1099 Pro (5%)
- W2 Mate (Real Business Solutions) (4%)
- AccountantsWorld ATF Payroll (2.3%)

- EG Systems (1%)

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use state tax agency websites or use the sales tax functions built into their (or their clients') accounting systems. However, among the votes for specific sales tax software, the results were:

WINNER: CFS Tax Software (28.8%)

Runners Up:

- Thomson Reuters ONESource Indirect Tax (20%)
- CCH Wolters Kluwer (SureTax/SalesTaxOffice/SalesTaxSaaS/STRO) (19.5%)
- Avalara AvaTax or Trustfile (12.6%)
- eFileSalesTax.com (12.4%)
- Bloomberg Tax Sales Tax Rates (4.1%)
- Vertex Indirect Tax (2.6%)

Sales & Use Tax Exemption Certificate Management

Insight: Managing sales tax 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: Thomson Reuters ONESOURCE Exemption Cert. Manager (65.8%)

Runners Up:

- Avalara AvaTax CertCapture (20.4%)
 - Vertex Inc. Exemption Certificate Manager (8.2%)
 - Sovos (formerly Imaging Science Services) 5.6%
-

Accounting Write-Up Systems

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- Thomson Reuters Accounting CS (8%)
 - PC Software Accounting Inc. (5%)
 - Sage One/ (2.9%)
 - Xero (2%)
 - AccountantsWorld Accounting Power (1.6%)
 - Client Accounting Suite (Wolters Kluwer) (1.5%)
-

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 (27.9%)

Runners Up:

- Thomson Reuters WorkPapers CS (22.2%)
- Wolters Kluwer CCH ProSystem *fx* Systems and ARM (10.3%)
- AuditFile (7%)
- Wolters Kluwer CCH Audit Accelerator (6%)
- Wiley Advantage Audit (6%)
- Audit Confirmations (5.8%)
- CaseWare IDEA (5.1%)
- Confirmation.com (3.9)
- Teammate Analytics (1.4%)
- Capital Confirmation (1.4%)
- Audit Dashboard Automated PBC (1.4%)

- Rivio Clearinghouse (0.8%)

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Cloud-based systems now automatically update payroll tax rates and other factors, taking much of the pain out of payroll, making it much easier to keep employees and clients happy, and maintaining compliance with state and federal agencies.

WINNER: QuickBooks Payroll – by Intuit*

Runners Up:

- Drake Client Write-Up/Payroll (13%)
- ADP Payroll Solutions (10.9%)
- Paychex (8.4%)
- Thomson Reuters Accounting CS Payroll or myPay (7.6%)
- PC Software Accounting Inc. (5%)
- Sage 50 (3.1%)
- AccountantsWorld Payroll Relief (2.3%)
- Gusto Payroll (2.1%)
- AMS 1099-Etc Payroll (2%)
- Wolters Kluwer Payroll Compliance Reporting (1.6%)
- SurePayroll (1.1%)
- Other (4.6%)

* **QuickBooks Payroll – by Intuit** includes QuickBooks Online Self Service Payroll, QuickBooks Online Full Service Payroll, QuickBooks Desktop Enhanced Payroll, and QuickBooks Desktop Assisted Payroll.

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 (42%)

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Practice Management/Time & Billing Systems

Insight: The systems in this two-part category range from simple tools for functions like time tracking, to extensive systems that offer deep analysis of firm productivity and include advanced workflow management.

Practice Management: WINNER: Thomson Reuters Practice CS (36%)

Runners Up:

- Sage Timeslips (19%)
 - Wolters Kluwer CCH Axcess, CCH iFirm & CCH ProSystem fx Practice Mgmt. (18%)
 - OfficeTools WorkSpace by AbacusNext (13%)
 - AccountantsWorld Practice Relief (7%)
 - ClientWhys/TaxBuzz.com (5%)
 - Other (2%)
-

Time & Billing: WINNER: TSheets by QuickBooks (38%)

Runners Up:

- TPS Software (26%)
 - ImagineTime (17%)
 - TaxWorkFlow (6%)
 - Bill4Time (5%)
 - BQE BillQuick (3%)
 - Other (5%)
-

Online Invoicing/Bill Payment Solutions WINNER: Intuit

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- Bill & Pay (2.5%)
 - FreshBooks (1.3%)
 - Zoho Books (0.7%)
-

Client Portals

Insight: 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. Client portals make sharing data with clients easier, and make it easier for them to submit documents to the firm.

WINNER: Drake Software SecureFilePro.com (47.2%)

Runners Up:

- Thomson Reuters NetClient CS Portals or Onvio (12.3%)
 - Citrix ShareFile (12%)
 - Wolters Kluwer CCH Axcess Portal/ProSystem *fx* / iFirm (7.1%)
 - eFileCabinet – SecureDrawer (8.2%)
 - SmartVault (5.5%)
 - OfficeTools by AbacusNext (2.6%)
 - AccountantsWorld Cloud Cabinet (1.8%)
 - ClientWhys/TaxBuzz.com (1.8%)
 - Doc.IT Web Client Portal (1%)
 - Audit Dashboard – Automated PBC (0.5%)
-

Document Management & Document Storage

Insight: The products in this category range from basic file folders, to advanced

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- eFileCabinet (2.5%)
- Wolters Kluwer CCH Axcess or ProSystem fx Document (3.4%)
- SmartVault Document Storage (3.2%)
- OfficeTools WorkSpace by AbacusNext (2.3%)
- Doc.IT (1.1%)
- AccountantsWorld Cloud Cabinet (1%)
- Other (2.5%)

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 (40.9%)

Runners Up:

- HP (26.6%)
- Canon (12.4%)
- Nuance (8%)
- cPaperless Tic-Tie-Calculate (6.9%)
- ABBYY (3.4%)
- Kofax (1.8%)

Tax Document Automation

WINNER: Intuit Tax Import for Lacerte & ProSeries (39.5%)

Runners Up:

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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 (41.5%)

Runners Up:

- OfficeTools WorkSpace by AbacusNext (21.1%)
- TaxWorkFlow (13.8%)
- Wolters Kluwer CCH iFirm Practice Manager (12.8%)
- XCM Workflow (4.5%)
- Pascal Workflow (4.2%)
- Autonomy iManage Workflow Manager (2.1%)

Other Workflow Tools:

WINNER: Intuit Tax Import or DMS for Lacerte and ProSeries (20.8%)

Runners Up:

- GruntWorx (20.2%)
- Thomson Reuters GoFileRoom/Practice CS/Workpapers CS (13.9%)
- eFileCabinet (10.9%)
- Citrix ShareFile for Accountants (8.9%)

- Bill.com (4.8%)

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Home Business Tools & Services (10.1%)

- Cabinet NG (0.1%)

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 (24.4%)

Runners Up:

- GetNetSet (20.8%)
- Thomson Reuters Web Builder CS (18.8%)
- CPA Site Solutions (10.6%)
- Wolters Kluwer CCH ProSystemfx SiteBuilder (5.1%)
- AccountantsWorld Website Relief (4.6%)
- Tenenz AFSB (3.8%)
- ClientWhys/TaxBuzz.com (3.8%)
- CPASites.com (2.3%)
- Integer (2.2%)
- Build Your Firm (1.8%)
- Rootworks (1.8%)

SMALL BUSINESS ACCOUNTING SYSTEMS

Insight: There are several sub-categories in this group: Below are the top vote-getters in each category.

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Online Small Business Accounting

WINNER: Intuit QuickBooks Online/Online Accountant (80.5%)

Runners Up:

- Thomson Reuters Client CS or CS Client Access (7.2%)
- Xero (3.7%)
- SageOne (2.9%)
- AccountantsWorld Accounting Power (1.6%)
- FreshBooks (0.8%)
- Sage Intacct (0.7%)
- Other (2.6%)

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Expense and Travel Management Solution

WINNER: Expensify (31.9%)

Runners Up:

- ReceiptBank (18.3%)
- Concur Expense (17.9%)
- Certify (9%)
- ExpenseWatch (5.5%)
- ExpensAble (4.3%)
- Tallie (4.3%)
- ZohoExpense (3.1%)
- Chrome River (2.3%)

- Xpenditure (1.5%)

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- Vend (42.3%)
- NetSuite OnSite POS (1%)
- AccuPOS (1%)
- Other (3%)

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Not-for-Profit Accounting

WINNER: Intuit QuickBooks Premier Nonprofit (88.8%)

Runners Up:

- Serenic Navigator (4%)
- Blackbaud Financial Edge or Fundware (1.7%)
- Aplos Software (1.7%)
- Abila (1.3%)
- Other (2.5%)

=====

Fixed Asset Management

WINNER: Intuit ProSeries Fixed Asset Manager (38.6%)

Runners Up:

- Thomson Reuters Fixed Assets CS (33.6%)
- Wolters Kluwer CCH ProSystem *fx* Fixed Assets & Fixed Asset Manager (13.9%)
- Sage FAS Asset Accounting (6.1%)
- Pro-Ware Asset Keeper (4%)

- Bloomberg Tax Fixed Assets (2.6%)

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Runners Up:

- Thomson Reuters Virtual Office CS/SaaS (28.4%)
- Xcentric / Right Networks (12.6%)
- AbacusNext Private Cloud and Cloudnine Realtime (4.9%)
- CPAASP/InsynQ (1.4%)
- Network Management Group Inc. (1.2%)
- Cetrom CPA Cloud (0.5%)
- Network Alliance Inc. (0.3%)

Outsourced Technology Services

WINNER: Xcentric / Right Networks (45.8%)

Runners Up:

- AppRiver (14.5%)
- Cloudnine Realtime by AbacusNext (13%)
- CPA2Biz Email Solutions (9.9%)
- Network Management Group Inc. (6.9%)
- InsynQ/CPAASP (6.1%)
- Cetrom (2.3%)
- CollBox (1.5%)

Laptop and Desktop Computers

WINNER: Dell (33.7%)

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- Other (5.2%)
-

Smart Phone Platform

- Apple (51.3%)
 - Android (45.2%)
 - Microsoft (3%)
 - Blackberry (0.5%)
-

Tablet Brand

- Apple iPad 44%
 - Samsung 16%
 - Kindle 9.7%
 - Microsoft Surface (7%)
 - HP 6%
 - Dell 5.9%
 - Google 3.1%
 - LG 2.5%
 - Asus 2%
 - Sony 1.2%
 - Lenovo 1%
 - Other 1.6%
-

Printers & Scanners

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• Lexmark 3.5%

- Samsung 2.5%
- Xerox 2%
- Other 2.5%

Office Supply Store:

- Office Max/Depot 27.8%
- Staples 26.4%
- Costco 11.8%
- Sam's Club 8.7%
- Best Buy 8.7%
- Wal-Mart 8.5%
- Quill 6.8%
- FedEx Office 1.3%

OUT-OFF-OFFICE

Favorite Form of Physical Exercise During Tax Season

WINNER: "Who has time to exercise?" (49.7%)

- Weightlifting (8.9%)
- Jogging/Running (8.8%)
- Bicycling (8.2%)
- Jumping to Conclusions (7.5%)

- Aerobics (7.2%)

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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:” 45%
2. Less than 1 hour: 18.5%
3. Between 1-4 hours: 11.5%
4. Between 5-9 hours: 7.5%
5. Between 10-14 hours: 4.5%
6. 15+ hours per week: 13%

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 (multiple responses were allowed):

- Facebook 36.4%
- LinkedIn 31%
- Twitter 10.6%
- Google+ 9%
- YouTube 8.5%

- Instagram 7.5%

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