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invited our readers to help us spotlight the technologies they most respect and trust to help them run their firms and provide client services.

Aug. 14, 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.

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. From online applications tax and accounting functions, to tax document automation and workflow management processes, as well as tools for collaboration, mobile productivity and office hardware.

The **Readers' Choice Awards** gives professionals a way stay aware of technologies and best workflow practices their peers are using in order to stay competitive in the constantly-evolving tax and accounting space.

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

2019 CPA Practice Advisor Readers' Choice Award 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

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- Thomson Reuters UltraTax or ProSystem K3 (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 to help prepare less common forms, help streamline tax workflow, or cover areas their primary tax prep system doesn't.

WINNER: QuickBooks Self-Employed (39%)

Runners Up:

- GruntWorx (20.1%)
- Thomson Reuters UltraTax CS Source Document (13.2%)
- Wolters Kluwer CCH Axcess (11%)
- Wolters Kluwer CCH ProSystem *fx* Scan with AutoFlow Technology (10%)
- Bloomberg Tax 709 & 706 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

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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 research systems integrate with tax preparation programs, while others are used separately, and can be used alongside any system. TheTaxBook once again won this category this year.

WINNER: TheTaxBook – Tax Materials Inc. (68.44%)

Runners Up:

- QuickFinder Tax Handbooks (7.5%)
- Thomson Reuters Checkpoint (RIA) (6.13%)
- TaxSpeaker (3.63%)
- CCH IntelliConnect (Wolters Kluwer) (3.61%)
- Parker Tax Pro Library (3.53%)
- Intuit Tax Research & TaxAlmanac.org (3.23%)
- Tax Talk Today (2.52%)
- Bloomberg Tax Financial (1.41%)

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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%)
- Others (4.9 %)

Sales & Use Tax

Insight: Small businesses can quickly be overwhelmed by sales tax compliance. Many new systems automate much of the compliance and reporting functions, as well as making it easier to manage processes. Most voters in this category said they 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%)

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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

Insight: Write-up has been fundamentally changed by the increasing adoption of web-based accounting systems, but clients still need periodic review and reconciliation of accounts.

WINNER: Intuit QuickBooks Accountant (57%)

Runners Up:

- Drake Client Write-Up (22%)
- 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%)

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- 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%)
-

Payroll

Insight: Payroll is once again the largest category in the Readers' Choice Awards. There are so many systems on the market that are designed for accounting firms or for small businesses to use directly, which is testament to the importance of payroll to modern businesses and the need for firms to provide this service to their clients. 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: Intuit QuickBooks Payroll, Enhanced Payroll & Full Service Payroll (38.3%)

Runners Up:

- Drake Client Write-Up/Payroll (13%)

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Practice Management/Time & Billing Systems Reporting (10%)

- SurePayroll (1.1%)
- Other (4.6%)

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%)

Runners Up:

- MoneySoft Corporate Valuation Pro, DealSense & Business Valuation Specialist (14.3%)
- ValuSource Pro, BVM Pro & Express Business Valuation (38.7%)
- ValuAdder (5%)

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%)

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Time & Billing: WINNER: T Sheets 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 Payments (45%)

Runners Up:

- PayPal (32%)
 - Bill.com (9%)
 - Xero (3.6%)
 - Sage Payments (3.2%)
 - ReceiptBank (2.7%)
 - Bill & Pay (2.5%)
 - FreshBooks (1.3%)
 - Zoho Books (0.7%)
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Client Portals

Insight: If your firm is sending documents via email, you may be breaking your

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- CCH Axess (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 programs that include client collaboration tools, automatic archiving, retention functions and multi-worker productivity features.

WINNER: Drake Document Manager (49.3%)

Runners Up:

- Intuit ProSeries & Lacerte DMS (14.6%)
- Thomson Reuters FileCabinet CS/GoFileRoom (13.1%)
- eFileCabinet (9.5%)
- 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%)

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

Tax Document Automation

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

Runners Up:

- GruntWorx Populate (28.4%)
 - Thomson Reuters Source Document Processing & Workpapers CS (15.8%)
 - Wolters Kluwer CCH iFirm and ProSystemfx Scan with AutoFlow (12.1%)
 - cPaperless (2.5%)
 - SurePrep 1040Scan Pro, 1040Scan Organize (1.7%)
 - 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.

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- Pascal Workflow (1.2%)
- 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%)
 - SmartVault (4.6%)
 - Wolters Kluwer CCH ProSystem *fx* Systems (4.3%)
 - OfficeTools WorkSpace by AbacusNext (3.9%)
 - Expensify (2.7%)
 - Doc.IT (2.1%)
 - SurePrep (1.1%)
 - Karbon Workflow Management (0.7%)
 - Tallie (0.6%)
 - Audit Dashboard – Automated PBC (0.5%)
 - Cabinet NG (0.1%)
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Website Builders & Services for Accounting

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- CPA Site Solutions (10.6%)
- Wolters Kluwer CCH ProSystem *fx* 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.

Small Business Accounting – Installed Programs

WINNER: Intuit QuickBooks Desktop (86%)

Runners Up:

- Sage One, Sage 50 or Sage ERP (6.3%)
- PC Software Accounting Inc. (6%)
- Other (1.7%)

Online Small Business Accounting

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

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- 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%)
- SpringAhead (1.2%)
- SutiExpense (0.7%)

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Retail Accounting/Point-of-Sale

WINNER: Intuit QuickBooks Point-of-Sale (52.7%)

Runners Up:

- Vend (42.3%)
- NetSuite OnSite POS (1%)

- AccuPOS (1%)

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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%)
- Other (1.2%)

GENERAL BUSINESS TECHNOLOGIES

ASP/Hosted Solution Providers

WINNER: Drake Hosted (50.7%)

Runners Up:

- Thomson Reuters Virtual Office CS/SaaS (28.4%)

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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%)

Runners Up:

- HP (27.4%)
- Lenovo (9.6%)
- Apple (5.6%)
- Acer (5.5%)
- Toshiba (5%)
- ASUS (4.1%)
- Samsung (2.9%)
- Sony (1%)
- Other (5.2%)

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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

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

- HP 39%
- Brother 20%
- Canon 11%
- Fujitsu 9.6%
- Epson 6.5%
- Dell 3.6%
- Lexmark 3.3 %
- Samsung 2.5%

- Xerox 2%

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- Staples 28.4%
- Costco 11.8%
- Sam's Club 8.7%
- Best Buy 8.7%
- Wal-Mart 8.5%
- Quill 6.8%
- FedEx Office 1.3%

OUT-OF-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%)
- Yoga (7%)
- Racket Sports (1.4%)
- Team Sports (1.1%)

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

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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%
- Yelp 4.5%
- Pinterest 4%
- SnapChat 1.5%

Thank you to the 4,300 tax and accounting professionals who participated in this year’s Readers’ Choice Awards.

Accounting • Auditing • Hardware • Technology

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