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readers the chance to spotlight the technologies they most respect and trust to provide client services, to manage their firms, and to help their clients run their businesses.

**Isaac M. O'Bannon** • Mar. 23, 2020



**From the April 2020 issue.**

Technology has played a vital role in the evolution of the accounting and tax profession over the past 30 years. Fortunately, accounting firms have largely embraced hosted and cloud-based systems that are making it easier for their staff to work remotely during the current Coronavirus pandemic.

These remotely-accessible technologies have reached into virtually all of the service

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automation and workflow management processes, as well as tools for collaboration, mobile productivity and office hardware.

The awards also let professionals see the technologies and best workflow practices their peers are using, which can help them stay competitive in the constantly-evolving tax and accounting space. Thank you to the thousands of readers who participated in voting this year. Now, on to the results!

## IN-FIRM TECHNOLOGIES

### Federal/State Income Tax Preparation

**Insight:** Always our most active category, nearly all of this year's Readers' Choice voters reported using or recommending a professional tax system. Drake Software has consistently dominated this and other tax-related categories in the annual awards, and they did so again this year, thanks in large part to the company's very active and loyal customers.

### WINNER: Drake Tax Software (40%)

#### Runners Up:

- Intuit Lacerte, ProSeries or TaxOnline (23.2%)
- Thomson Reuters UltraTax or GoSystem RS (8.8%)
- Wolters Kluwer CCH Small Firm Services ATX or TaxWise (8%)
- Wolters Kluwer CCH Axxess or ProSystem *fx* (6.4%)
- TaxAct Preparers' Editions (4%)
- RCS TaxSlayer Pro (2.4%)
- Canopy (1.5%)
- MyTaxPrep Office (1%)
- Other (4.7%)

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and other family matters.

### **WINNER: Drake Tax Planner (45.6%)**

#### **Runners Up:**

- Intuit Lacerte Tax Planner (24.7%)
- Thomson Reuters Checkpoint or Planner CS (10.2%)
- Wolters Kluwer CCH ProSystem *fx* Planning and *fx* for Small Firms (6.9%)
- Bloomberg Tax Income Tax Planner (6.7%)
- Other (5.9%)

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### **Specialty Systems & Tax Prep Tools**

**Insight:** Some firms have additional needs when it comes to taxes, whether for uncommon returns or for their practice's workflow process. So, they turn to specialty systems.

### **WINNER: QuickBooks Self-Employed (23.2%)**

#### **Runners Up:**

- GruntWorx (19.5%)
- Canopy Tax Resolution Services (7.9%)
- Wolters Kluwer CCH ProSystem *fx* Suite Scan w/AutoFlow (7.8%)
- Wolters Kluwer CCH Axxess (7.6%)
- Thomson Reuters UltraTax CS Source Document (7%)
- SurePrep 1040SCAN & TaxCaddy (4.6%)
- Taxfyle (4%)

- Bloomberg Tax 709 & 706 Preparer (2.7%)

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**Insight:** Professionals can't prepare taxes or help clients plan for future scenarios unless they know some tax code and strategies. Of course, nobody can know everything, so it's important to have access to comprehensive tax research tools. 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 handily won this category this year for its popular and inexpensive system.

**WINNER: TheTaxBook – Tax Materials Inc. (52.6%)**

Runners Up:

- Thomson Reuters Checkpoint (RIA) (9.7%)
- QuickFinder Tax Handbooks (8.2%)
- Intuit Tax Research & TaxAlmanac.org (5.5%)
- CCH IntelliConnect (Wolters Kluwer) (5.1%)
- Parker Tax Pro Library (4.8%)
- TaxSpeaker (4.2%)
- Bloomberg Tax Financial (3.9%)
- Tax Talk Today (2.3%)
- Other (3.7%)

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## Tax Document Automation

**Insight:** These systems help tax firms do more with less, by removing much of the tedious data entry work. The data automatically flows into the tax prep system after it is scanned. Some of these programs also prepare digital workpapers.

## **WINNER: Intuit Tax Import for Lacerte & ProSeries (27.56%)**

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### **Sales & Use Tax Preparation**

**Insight:** Trying to keep up with sales taxes can quickly become an overwhelming task, particularly with new rules relating to the U.S. Supreme Court's Wayfair decision. Many systems automate much of the compliance and reporting processes, including filing and payments. Most voters in this category (22%) said they use state tax agency websites or use the sales tax functions built into accounting systems (35%). However, among the votes for specific sales tax software, the results were:

#### **WINNER: Avalara AvaTax, Avalara Returns, or TrustFile (25.6%)**

##### **Runners Up:**

- CFS Tax Software (11.7%)
- TaxJar (9.7%)
- Vertex Inc. (9.3%)
- Thomson Reuters ONESource Indirect Tax (9%)
- CCH Wolters Kluwer (SureTax/SalesTaxOffice/SalesTaxSaaS/STRO) (8%)
- Bloomberg Tax Sales Tax Rates (4.9%)
- eFileSalesTax.com (4.8%)
- Sovos Tax Solutions (1.1%)
- Other (15.9)

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### **Sales & Use Tax Exemption Certificate Management**

**Insight:** Businesses who occasionally or routinely make sales to purchasers who are

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- Vertex Inc. Exemption Certificate Manager (20.2%)
- Thomson Reuters ONESOURCE Exemption Cert. Manager (21%)
- Sovos Tax Solutions 5.9%
- Other (13.5%)

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## Accounting Write-Up Systems

**Insight:** Write-up has been fundamentally changed by the increasing adoption of web-based accounting systems, but since small businesses are frequently victims of bookkeeping and employee fraud (and just bad bookkeeping), your business clients still need periodic review and reconciliation of accounts by a professional public accountant.

**WINNER: Intuit QuickBooks Accountant (53.8%)**

Runners Up:

- Drake Accounting (17.3%)
- PC Software Accounting Inc. (7.5%)
- Thomson Reuters Accounting CS (5.2%)
- Xero (3.2%)
- Sage One (2.1%)
- Client Accounting Suite (Wolters Kluwer) (1.9%)
- AccountantsWorld Accounting Power (1.7%)
- UBCC Real Time Accounting (0.4%)
- CYMA Systems (0.3%)
- Other (6.6%)

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- Wolters Kluwer CCH ProSystem *fx* Systems and ARM (20.2%)
- AuditFile (9.6%)
- Audit Confirmations (8.1%)
- Confirmation.com (7.4)
- CaseWare IDEA (5.2%)
- Teammate Analytics (3%)
- Capital Confirmation (2.6%)
- Audit Dashboard Automated PBC (2.3%)
- Wiley Advantage Audit (1.9%)
- Rivio Clearinghouse (1.5%)
- Other (11.4%)

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## Business Valuation

**Insight:** Accounting and tax professionals involved in business transfers, divorce litigation and family wealth planning often find a need for assessing the value of a business entity. This is, admittedly, a small niche among accounting firms served by a few technology vendors. About 10% of our voters had a preference in this category.

**WINNER: ValuSource Pro, BVM Pro & Express Business Valuation (42%)**

Runners Up:

- SageWorks Valuation Solution (22.3%)
- MoneySoft Corporate Valuation Pro, DealSense & Business Valuation Specialist (14.7%)

- ValuAdder (7.7%)

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#### Runners Up:

- Intuit ProSeries Fixed Asset Manager (25.7%)
- Wolters Kluwer CCH ProSystem *fx* Fixed Assets & Fixed Asset Manager (13.2%)
- Sage FAS Asset Accounting (7.3%)
- Pro-Ware Asset Keeper (6.8%)
- Bloomberg Tax Fixed Assets (4.1%)
- Wasp Barcode Technologies (1.5%)
- Real Asset Management Inc. (1.2%)
- MultiView Asset Management (0.7%)
- Open Systems (0.7%)
- Other (11.1%)

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#### Payroll

**Insight:** Payroll is the most outsourced business process, as evidenced by the sheer number of products in this category, and we couldn't even include them all. There are so many systems on the market that are designed for accounting firms or for small businesses to use directly. Cloud-based systems now automatically update payroll tax rates and other factors, even preparing monthly, quarterly and annual reporting, taking much of the pain out of payroll, making it much easier to keep employees and clients happy.

**WINNER: QuickBooks Payroll – by Intuit\* (31.2%)**

#### Runners Up:



- Drake Accounting (11.3%)

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Survey (10%)

- OnPay (1%)
- Other (14.8%)

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

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## 1099/W-2 Compliance

**Insight:** Year-end payroll (and contractor) compliance systems that prepare W-2 and 1099 forms and can automatically file them, can help relieve much of the burden of processing hundreds or thousands of forms for your clients each year. Some systems also help streamline the entire process, including mailing of copies to recipients. Drake Accounting won this year's voting, with its integrated W-2 and 1099 compliance functions.

**WINNER: Drake Accounting (25.3%)**

Runners Up:

- eFile4Biz (9.1%)
- Thomson Reuters Accounting CS Payroll Compliance (8.3%)
- AMS 1099-ETC (8%)
- Track 1099 (8%)
- W2/1099 (Wolters Kluwer ATX and TaxWise) (6.1%)
- EagleView (5.8%)
- 1099 Pro (5.5%)
- Greatland/Yearli (5.5%)

- Tenenz (4.3%)

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**Insight:** Managing time for firm staff and projects is critical for firm efficiency, with the end product of invoicing helping ensure steady revenue flow. Effective time management is essential whether firms bill by the hour for some projects or are strictly on a value billing method.

**WINNER: TSheets by QuickBooks (42.9%)**

Runners Up:

- OfficeTools Workspace by AbacusNext (12.1%)
- Sage Timeslips (10.5%)
- Bill.com (10.2%)
- ImagineTime (6%)
- TPS Software (5.3%)
- AccountantsWorld Practice Relief (4%)
- PracticeEngine (2.6%)
- ClockShark (2.3%)
- Bill4Time (1.7%)
- Other (2.4%)

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## Practice Management

**Insight:** We define practice management as those with more extensive functions for managing firm productivity and workflow management, automation of tasks, and record maintenance.

## WINNER: Thomson Reuters Practice CS (27.9%)

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- Other (5.3%)

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## Online Invoicing/Bill Payment Solutions

**Insight:** Stand-alone invoicing tools can help firms with AR, while bill payment systems can help streamline AP.

## WINNER: Intuit Payments (43.5%)

Runners Up:

- PayPal (18.1%)
- Bill.com (15%)
- Xero (7.5%)
- ReceiptBank (4.6%)
- Invoiced (2.7%)
- Sage Payments (2.7%)
- Bill & Pay (2.3%)
- FreshBooks (1.6%)
- CollBox (1.6%)
- Zoho Books (0.4%)

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## Client Portals

**Insight:** Please don't send client invoices by email, as it's insecure and you could be breaking your state's privacy laws and face fines. Client portals make sharing data

with clients easier, and make it easier for them to submit documents to the firm.

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- ClientWhys/TaxBuzz.com (0.4 %)
- Wolters Kluwer CCH Axcess Portal/ProSystem *fx* / iFirm (5.5 %)
- Canopy (4%)
- CPASiteSolutions (4%)
- cPaperless SafeSend Returns (3.4%)
- OfficeTools from AbacusNext (2.1%)
- AccountantsWorld CyberCabinet (1.3%)
- Other (1.7%)

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## Document Management & Document Storage

**Insight:** There is a wide range of systems in this category, ranging 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 (44.8%)**

Runners Up:

- Thomson Reuters FileCabinet CS/GoFileRoom (12.4%)
- eFileCabinet (10.8%)
- Intuit ProSeries & Lacerte DMS (10.3%)
- SmartVault Document Storage (6%)
- ClientWhys/TaxBuzz.com (4.1%)
- Wolters Kluwer CCH Axcess or ProSystem *fx* Document (4%)
- OfficeTools WorkSpace by AbacusNext (2.8%)
- AccountantsWorld Cloud Cabinet (1.6%)
- Doc.IT – Doc.IT DM (1%)
- PaperlessPLUS (Wolters Kluwer) (1%)

- Other (1.2%)

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**WINNER: Fujitsu (41.4%)**

Runners Up:

- HP (19.3%)
- Canon (15%)
- cPaperless Tic-Tie-Calculate (10%)
- Nuance (7%)
- Kofax (4.1%)
- ABBYY (3.5%)

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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 (29.5%)**

Runners Up:

- OfficeTools WorkSpace by AbacusNext (24.3%)
- Wolters Kluwer CCH Axxess or iFirm (17.8%)
- XCM Workflow (11.2%)
- TaxWorkFlow (9.5%)
- Pascal Workflow (5.3%)

- Autonomy iManage Workflow Manager (2.4%)

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- Intuit Tax Import or DMS for Lacerte and ProSeries (10.6%)
- Citrix ShareFile for Accountants (10.4%)
- Thomson Reuters GoFileRoom/Practice CS/Workpapers CS (8.7%)
- Bill.com (7.6%)
- Canopy (5.6)
- Expensify (5.4%)
- SmartVault (4.7%)
- Wolters Kluwer CCH ProSystem *fx* Systems (4.5%)
- OfficeTools WorkSpace by AbacusNext (3.8%)
- SurePrep (2.4%)
- Karbon Workflow Management (2.4%)
- Doc.IT (1.1%)
- Other (1.4%)

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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: CPA Site Solutions from ProSites (16.6%)**

Runners Up:

- GetNetSet (16%)
- Drake SiteDart Website Services (15.7%)
- CountingWorks/ClientWhys/TaxBuzz (14%)
- Thomson Reuters Web Builder CS (10%)
- AccountantsWorld Website Relief (7.1%)

- Tenenz AFSB or Integer (5.7%)

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**Insight:** Whether keeping up on the latest change in tax, A&A, firm management or technology, earning CPE credit is mandatory for CPAs.

**WINNER: State CPA Societies/Other Professional Organizations (56.5%)**

Runners Up:

- AICPA (13.2%)
  - CPA Practice Advisor (10.6%)
  - Surgent CPE (5.5%)
  - CPAcademy 4.5%
  - Canopy CPE (3.9%)
  - NASBA (3.6%)
  - Becker CPE (2.2%)
- 

**How Do You Prefer to Earn CPE?**

**Insight:** There are many ways to earn CPE: online, through conferences, through paid events, and via state societies.

**WINNER: In-Person Seminars/Conferences (34.8%)**

Runners Up:

- Live Online Webcasts (31.2%)
  - Self-Study with Tests (28%)
  - Other (6%)
-

## Which Conferences Do You Attend?

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Runners Up:

- AICPA ENGAGE (Las Vegas) (12%)
- NAEA National Conference (11%)
- Scaling New Heights (8.7%)
- Thomson Reuters Synergy (7%)
- New York Accounting Show (6%)
- CCH Connections (5.5%)
- FICPA- Florida (5.3%)
- LA Accounting Show (4.5%)
- XeroCon (3.8%)
- AICPA Digital CPA (3.8%)
- ICPA Summit Chicago (2.8%)
- New Jersey Accounting Show (2.8%)
- Sage Summit (2.2%)
- Avalara CRUSH (1.7%)
- Toronto Accounting Show (1.1%)
- Sage Intacct Advantage (0.8%)

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## 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 (76.9%)

Runners Up:



- PC Software Accounting Inc. (9.3%)

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- Xero (5.2%)
- Thomson Reuters Client CS or CS Client Access (2.4%)
- AccountantsWorld Accounting Power (1.6%)
- SageOne (1.6%)
- Sage Intacct (1.6%)
- NetSuite (1.3%)
- FreshBooks (1.2%)
- Other (8.5%)

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## Expense and Travel Management Solution

**Insight:** Travel and expense management is a critical financial management function in organizations. About 16% of voters claimed an alternate method (including spreadsheets), but of those who cast a vote for a true expense management solution, the results are:

**WINNER: Expensify (45.4%)**

Runners Up:

- ReceiptBank (18.4%)
- Concur Expense (16.7%)
- SpringAhead (4%)
- Certify (2.9%)
- Chrome River (2.9%)
- ExpensAble (2.3%)
- ExpenseWatch (2.3%)

- Xpenditure (1.7%)

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#### Runners Up:

- Intuit QuickBooks POS (36%)
- NetSuite OnSite POS (3.8%)
- Database Creations (1.9%)
- AddSum (1.3%)
- Cougar Mountain Denali (1.3%)
- Radiant Systems (0.9%)
- Vend POS (0.6%)
- Wasp Barcode (0.6%)
- Celerant Command Retail (0.6%)
- AccuPOS (0.6%)
- Other (12.3%)

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#### Not-for-Profit Accounting

**WINNER: Intuit QuickBooks Premier Nonprofit (69.8%)**

#### Runners Up:

- Sage Intacct (6.2%)
- Blackbaud Financial Edge or Fundware (3.1%)
- Cougar Mountain FUND Suite (2%)
- Other (18.9%)

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#### REMOTE TECHNOLOGIES

## ASP/Hosted Solution Providers

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- Network Management Group Inc. (NMGI) (2%)
- Network Alliance Inc. (1.2%)
- Cetrom CPA Cloud (0.8%)
- Other (10.7%)

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## Outsourced Technology Services

**Insight:** About 24% of survey takers state a preference for a solution or practice not on the list, and each year we add products to the list of which that we were previously unaware. Of the votes for the solutions listed, the results were:

**WINNER: Right Networks Cloud Premier (43.6%)**

Runners Up:

- CPA2Biz Email Solutions (15.9%)
- InsynQ/CPAASP (8.9%)
- AppRiver (8.9%)
- CollBox (7.9%)
- Network Management Group Inc. (NMGI) (6.9%)
- Cloudnine Realtime by AbacusNext (6.9%)
- Cetrom (1%)

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## PERSONAL TECHNOLOGIES

### Smart Phone Platform

- Apple (52.56%)

- Android (44.77%)

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- Android/Google/Chrome (22.48%)
- Microsoft Surface (9.62%)
- Other (3.92%)
- Don't Use (27.45%)

## Do You Have a Smart TV?

**Insight:** If your tv has an internet connection or wifi capability and can run some apps, then it is some variation of a smart tv.

- Yes (63.31%)
- No (36.69%)

## GENERAL OFFICE TECH

### Printers & Scanners

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

- HP (34.5%)
- Brother (20%)
- Canon (12.9%)
- Fujitsu (10.4)
- Epson (7.2%)
- Other (15%)

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- 
- Quill (6%)
  - FedEx Office 1.9%
  - Other (6%)

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## OUT-OF-OFFICE

### Favorite Form of Physical Exercise During Tax Season

**WINNER: "Who has time to exercise?" (32.4%)**

- Weightlifting (9.5%)
- Jogging/Running (8.9%)
- Bicycling (8.4%)
- Jumping to Conclusions (7.5%)
- Aerobics (7.1%)
- Yoga (6.2%)
- Aerobics (4.8%)
- Team Sports (2.2%)
- Racket Sports (1.4%)
- Other (11.6%)

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## How Remote Are You?

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 in my home or car:” 40.8%

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## 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 22.6%
- Twitter 21.1%
- LinkedIn 9.3%
- YouTube 7%
- Instagram 7.1%
- Google+ 4.7%
- Pinterest 3%
- Don’t use any social media for business 18.4%
- Other 6.8%

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Thank you to the more than 1600 tax and accounting professionals who participated in this year’s Readers’ Choice Awards.

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