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FIRM MANAGEMENT

Reviews of Hosting Systems for Accounting Firms

As we all are dealing with the near universal push to remote in 2020, everyone has had to figure out overnight how to work virtually or remotely, and, for some, their tech stack made this conversion.

Garrett Wagner, CPA • Dec. 29, 2020



A common recent term is “technology stack” or “tech stack” for short, which just means a list of all the technology solutions an organization uses/leverages to be

successful. The bedrock of any tech stack is the organizations IT infrastructure, which is made up of your physical hardware, software, servers, user profiles, backups and so on.

As we all are dealing with the near universal push to remote technologies, everyone has had to figure out overnight how to work virtually or remotely, and, for some, their tech stack made this conversion. For others, each day was another brutal challenge and hurdle to get users connected, buy them new devices, figure out various software glitches, and spend countless wishing things would “just work.”

A key to making your office *just work*, is a cloud-based hosted solution, which takes the bedrock of your tech stack, and, instead of being something you have to spend your time worrying about, focusing on updating, and supporting, all those features are handled by a third party whose one and only job is to make sure things just work!

The concept behind hosting is to take the IT department, project, updates, challenges, maintenance, and variable cost structure and leverage the knowledge of a third-party company to focus on those key areas. In essence you subscribe to the level and volume of IT support and bandwidth you need instead of making large capital outlays. Like any good subscription service, a key benefit is that you can drastically increase your speed and volume with a single phone call, say when busy season starts, and then reduce that same bandwidth once the workload settles down in the summer, helping your organization save costs and providing more resources when you truly need them.

The concept of a hosted desktop, server, or application is simple. Instead of installing an application on your own desktop, the application is installed on the hosting company servers. Your business is then provided with online access to your resources, making them accessible from virtually any device anywhere, with the same functionality you had when everything sat within the four walls of your office.

Key Point: While moving to a hosted provider is a vital move to make, you still need to research each service provider given how complicated and evolving this field in. A key tip is to consider a national vendor who focuses solely on accounting firms. I understand the value of this approach; while our software needs are far from cutting edge, our software a hyper specific and the issues, while frustrating at times, are easily fixed by people who are used to dealing with them. Too often I hear horror stories of local IT companies taking days to fix an issue with a specific tax software, which should take 5 minutes, simply because the company is not familiar with that software.

Once you are ready to move forward with a hosted provider, here are five tips for firm owners to consider according to Joseph E. Brunsman of CLP Brokers:

1. Much like the engagement letter your firm offers to clients, request a written description of what services are being offered, and what services are not being offered by the service provider.
2. With ransomware being a massive threat to every business, investigate the backup solution that your service provider is offering.
3. Look for a service provider that is able to explain topics in a way you can understand. This should minimize frustrating errors and miscommunications down the line when an issue arises.
4. As with tax returns, there will always be a cheaper solution. Focus on vendors who understand the accounting vertical, our software, and business challenges.
5. Ask about their credentials. While credentials alone will not guarantee that they are immune from making errors, it does point towards their willingness to stay current with the latest changes in technology.

In this issue of *CPA Practice Advisor*, we've reviewed four product hosting providers. The products vary, with basic QuickBooks hosting offered in some, to custom server and data migration services offered in others. The products included in this review are:

- [AbacusNext Private Cloud](#)
- [Ace Cloud Hosting](#)
- [Cetrom CPA Cloud](#)
- [Cloudvara](#)
- [Right Networks](#)

If you're tired of trying to manage all of your technology solutions in-house and require your team to be able to work securely anywhere anytime, stop the frustration, join the modern era and host your IT bedrock/infrastructure with one of these third parties and say goodbye to frustration.

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