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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 ...

Isaac M. O'Bannon • Apr. 01, 2022



From the April 2022 issue.

As the pandemic has receded, most accounting firms have emerged to a more digitally-focused practice, with workflow models less reliant on in-person client visits. As such, technology has taken on an even greater importance for successful practices, enabling remote engagements as well as a more remote firm staff model. Accompanying this tech evolution for firms has been a corresponding evolution in the business models of their clients, where professionals have helped small

businesses embrace technologies that help them be more streamlined and remote-

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The Readers' Choice awards give professionals the chance to see which technologies and workflow systems their peers are using, and that can help them build more efficient and profitable workflows for their own practice. We thank the more than 5,000 professionals who participated in voting this year. And now, the results are in:

## IN-FIRM TECHNOLOGIES

### Federal/State Income Tax Preparation

**Insight:** This is always the most voted-on category each year, since nearly all respondents report using a professional tax system. Drake Software continues to inspire the users of its tax prep, planning and management system to turn out in high numbers to vote, resulting in another win this year, and showing the loyalty these professionals have for this company's software.

### WINNER: Drake Tax Software (28%)

#### Runners Up:

- Intuit Lacerte, ProSeries or ProConnect TaxOnline (21%)
- Wolters Kluwer: CCH Axcess Tax, CCH ProSystem fx Tax, ATX or TaxWise (16.5%)
- MyTaxPrep Office (11.6%)
- Thomson Reuters UltraTax or GoSystem RS (9.8%)
- TaxAct Preparers' Editions (3.4%)
- RCS TaxSlayer Pro (3%)
- Other (6.7%)

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### Tax Planning Systems

**Insight:** Even basic tax planning can make a big difference in reducing future tax

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- Wolters Kluwer CCH ProSystemtax Planning (7.9%)
- Corvee Tax (5.6%)
- Bloomberg Tax Income Tax Planner (5%)
- Other (24.6%)

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## Specialty Systems & Tax Prep Tools

**Insight:** Even the most comprehensive tax prep system may not quite have everything you need for uncommon returns or your firm's workflow process. We call these tools that fill in the gaps or help amp your firm productivity, "specialty systems." Voters were allowed to select more than one, so totals exceed 100%.

### WINNER: QuickBooks Self-Employed (24.6%)

Runners Up:

- CCH Axcess (Wolters Kluwer) (23.2%)
  - GruntWorx (15.5%)
  - SurePrep 1040SCAN & TaxCaddy (14.6%)
  - Canopy Tax Resolution Services (7.6%)
  - Thomson Reuters UltraTax CS Source Doc Processing (7.4%)
  - Taxfyle (5.2%)
  - Bloomberg Tax 709 & 706 Preparer (4.1%)
  - Sageworks E-Tax Return Reader (2.4%)
  - DynaTax (2.1%)
  - Other (15)%
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**WINNER: TheTaxBook – Tax Materials Inc. (52.7%)**

Runners Up:

- Thomson Reuters Checkpoint (RIA) (10%)
  - QuickFinder Tax Handbooks (9.3%)
  - CCH IntelliConnect or CCH Accounting Research Manager (Wolters Kluwer) (7.4%)
  - Intuit Tax Research & TaxAlmanac.org (7.1%)
  - Parker Tax Pro Library (5.8%)
  - TaxSpeaker (5.5%)
  - Bloomberg Tax Financial (3.9%)
  - Tax Talk Today (3.5%)
  - Other (18%)
- 

### Tax Document Automation

**Insight:** Do more with less, by automating some of the data entry. When the source documents are scanned, the systems identify the data and automatically populate client returns with it. Many of these systems also prepare digital workpapers.

**WINNER: Intuit Tax Import for Lacerte & ProSeries (23.8%)**

- GruntWorx Populate (16.4%)
- SurePrep 1040Scan Pro, 1040Scan Organize (13%)
- Wolters Kluwer CCH iFirm or ProSystem fx Scan (9.4%)
- cPaperless SafeSend Returns (7.8%)
- Thomson Reuters Source Document Processing & Workpapers CS (7.8%)

- Canopy Tax (6.6%)

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of the taxing jurisdictions. Most voters in this category said they use state tax agency websites or use the sales tax functions built into accounting systems (34.6%).

However, among the votes for specific sales tax software, the results were:

**WINNER: Avalara AvaTax, Avalara Returns (14%)**

Runners Up:

- CFS Tax Software (8%)
- CCH Wolters Kluwer (SureTax/SalesTaxOffice) (6.6%)
- Thomson Reuters ONESource Indirect Tax (4.8%)
- eFileSalesTax.com (4.6%)
- Bloomberg Tax Sales Tax Rates (4.5%)
- TaxJar (4.1%)
- Sovos Tax Solutions (2.9%)
- Vertex Inc. (2%)

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- Calculate Within Accounting System (31%)
- State Tax Agency Websites (12%)
- Other (5.5%)

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## Sales & Use Tax Exemption Certificate Management

**Insight:** The number one sales tax audit risk (after non-compliance) is exemption certificates. Businesses that occasionally or routinely make sales to purchasers who are exempted from sales taxes must maintain a record of their certificates. Although

most firms in our survey did not express a preference or personal use with these

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• Other (8.5%)

## Accounting Write-Up Systems

**Insight:** Online accounting systems have dramatically changed write-up, but the basics are still the same: ensuring a business' bookkeeping is accurate. Since small businesses are frequently victims of internal fraud (or bad bookkeeping), their books still need periodic review and reconciliation by a professional.

**WINNER: Intuit QuickBooks Accountant (52.3%)**

Runners Up:

- Drake Accounting (11.3%)
- Thomson Reuters Accounting CS (6.1%)
- Xero (4.9%)
- Sage Intacct or Sage One (4.4%)
- AccountantsWorld by IRIS Accounting Power (4.3%)
- Client Accounting Suite (Wolters Kluwer) (3.1%)
- CYMA Systems (2.3%)
- PC Software Accounting Inc. (2.2%)
- Visual Bookkeeper (0.8%)
- UBCC Real Time Accounting (0.4%)
- Other (7.9%)

## Audit Engagement Tools

**Insight:** With the cloud and other remote technologies, including helpful

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- Thomson Reuters Workpapers ES, Advanced Flow of Checkpoint (17.4%)
- AuditFile (10.54%)
- CaseWare IDEA (10.45%)
- Audit Confirmations (8.6%)
- Confirmation.com (6.9%)
- Suralink (6.9%)
- Capital Confirmation (6.6%)
- Audit Dashboard Automated PBC (6.1%)
- OnPoint PCR (4.4%)
- Wiley Advantage Audit (3.9%)
- Rivio Clearinghouse (3.1%)
- Teammate Analytics (2.7%)
- Other (9%)

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## Business Valuation

**Insight:** Assessing the value of a business is often necessary during ownership transfers, divorce litigation, and family wealth planning. Although a small niche, about 10% of our voters had a preference in this category.

**WINNER: SageWorks – Valuation Solution (31.6%)**

Runners Up:

- ValuSource Pro, BVM Pro & Express Business Valuation (25.7%)
- MoneySoft Corporate Valuation Pro, DealSense & Business Valuation Specialist (17.3%)
- ValuAdder (16.1%)
- Other (9.3%)

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**WINNER: Thomson Reuters Fixed Assets CS (25.1%)**

#### Runners Up:

- Intuit ProSeries Fixed Asset Manager (21.7%)
- CCH Fixed Assets Manager or CCH ProSystem *fx* Fixed Assets (Wolters Kluwer) (12.3%)
- Pro-Ware Asset Keeper (7.1%)
- Sage FAS Asset Accounting (7%)
- MultiView Asset Management (4.3%)
- Real Asset Management Inc. (4%)
- Bloomberg Tax Fixed Assets (3.9%)
- Open Systems (3.5%)
- Wasp Barcode Technologies (2.5%)
- Other (8.3%)

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## Payroll

**Insight:** Payroll is the largest category in the awards, with a wide range of systems available. Payroll systems have gotten very self-service and interconnected over the last several years, allowing payroll services to become a reliable revenue channel for many firms, who are able to process dozens or hundreds of payrolls each month with systems that automate most tasks, from payroll runs to reporting.

**WINNER: QuickBooks Payroll – by Intuit\* (25.9%)**

#### Runners Up:

- ADP Payroll Solutions (14.8%)



- **Gusto Payroll (8.8%)**

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Payroll Software (1.1%)

- BenefitMall (1.4%)
- SurePayroll (1.3%)
- Cougar Mountain (1.2%)
- OnPay (1.1%)
- Other (Real Business Solutions, Rippling, PenSoft, CYMA, PCSAI, OnPay, Paylocity, Red Wing Software, JustWorks, PayCom, Workful): (14.5%)

\* **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:** Most W-2 and 1099 systems for professionals can handle multiple clients with functions for filing and distributing wage forms, and helping to eliminate much of the work required to process hundreds or thousands of forms each season. About 75% of our voters reported using a professional wage reporting system.

## **WINNER: Drake Accounting (13.4%)**

### Runners Up:

- eFile4Biz (7.6%)
- CFS Tax Tools (6.8%)
- WoltersKluwer Payroll Compliance or W2/1099 (6.1%)
- AMS 1099-Etc (5.9%)
- Track 1099 (5.8%)
- Thomson Reuters Accounting CS Payroll Compliance (5.4%)

- Intuit QuickBooks Products (5.2%)

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#### EC Systems (4.0%)

- FormMagic Tax-Mate (0.9%)
- Spokane Computer MAG-FILER (0.4%)
- Other: (14.8 %)

## Time & Billing

**Insight:** Time and billing management systems do so much more than the name implies, also offering advanced project tracking and reporting that can help determine productivity, profitability of segments of the firm, and identifying roadblocks.

**WINNER: TSheets by QuickBooks (18.2%)**

Runners Up:

- Bill.com (9.6%)
- AccountantsWorld by IRIS Practice Relief (7%)
- Sage Timeslips (5.4%)
- OfficeTools Workspace by AbacusNext (5.1%)
- BQE Software (4.7%)
- BigTime IQ (4.6%)
- CPACCharge by Affinipay (4.6%)
- TPS Software (4.6%)
- Canopy Practice Management (4.3%)
- Chrometa (4%)
- ImagineTime (3.9%)
- ClockShark (3.1%)
- PracticeEngine (3.1%)

- Bill4Time (2.8%)

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**Insight:** We consider practice management systems to be those with more extensive functions for managing firm productivity and workflow management, automation of tasks, and record maintenance. This is the second year that Financial Cents has led this category.

**WINNER: Financial Cents (30%)**

Runners Up:

- Thomson Reuters Practice CS (16.1%)
- CCH Axcess Practice, CCH iFirm Practice Manager, CCH ProSystem *fx* Practice Management, or XCM Workflow (Wolters Kluwer) (13.1%)
- Canopy Tax Practice Management (8.4%)
- AbacusNext OfficeTools (7.3%)
- Karbon Workflow Management (5.2%)
- ClientWhys/TaxBuzz.com (2.2%)
- TaxWorkFlow (2.1%)
- Commercial Logic APS (1.4%)
- Abak Software (1.35%)
- Deltek Maconomy (1.35%)
- BQE Core or Core AI (1.2%)
- Credenza Software (0.8%)
- Tenrox (0.2%)
- Other (9.3%)

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**Online Invoicing/Bill Payment Solutions**

**Insight:** Online invoicing and bill payment systems can help streamline AP and AR,

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- CCH Charge by Amount Pay (6.7%)
- Xero (5.6%)
- Invoiced (5%)
- FreshBooks (4.3%)
- AbacusNext OfficeTools (3.7%)
- Bill & Pay (3.4%)
- Sage Payments (3.3%)
- ReceiptBank (2.8%)
- Zoho Books (2.5%)
- CollBox (2.1%)
- BizPayO (2%)
- Other: (16%)

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## Client Portals

**Insight:** Your firm better not be sending identifying client information via email. But even for invoices that may not expose such info, having them remotely accessible to clients in a firm portal not only helps protect the data, it makes it easier for clients to access them and even pay them online. Along with being able to view or upload tax documents, financials or other files, portals just make sense for modern firms.

**WINNER: Drake Software Drake Portals (21.5%)**

Runners Up:

- Citrix ShareFile (9.8%)
- DropBox (8.2%)
- CCH Axcess Portal / CCH ProSystem *fx* Portal / CCH iFirm or XCM Solutions (5.9%)
- Thomson Reuters NetClient CS Portals or Onvio (5.3%)

- Canopy (4.8%)

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AccountantsWorld by IRIS Cloud Cabinet (2.7%)

- Suralink (1.7%)
- Audit Dashboard (1.6%)
- Other (16%)

## 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 (28.2%)

Runners Up:

- Thomson Reuters FileCabinet CS/GoFileRoom (10.8%)
- Intuit ProSeries & Lacerte DMS (9.6%)
- CCH Axcess Document or CCH ProSystem *fx* Document (8.3%)
- ClientWhys/TaxBuzz.com (5.8%)
- eFileCabinet (4.2%)
- SmartVault Document Storage (4%)
- Doc.IT by IRIS – Doc.IT DM (3.7%)
- Canopy (3%)
- Conarc (2.8%)
- AccountantsWorld by IRIS Cloud Cabinet (2.7%)
- OfficeTools Workspace by AbacusNext (2.5%)
- Cabinet SafeCloud (2%)
- Suralink (1.9%)
- Doculex (1.8%)

- PaperlessPlus (1%)

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with a scanner or work with a document management system directly for functions including OCR. Voters were allowed to select more than one, so totals exceed 100%.

**WINNER: Fujitsu (36%)**

Runners Up:

- HP (20.3%)
- cPaperless TicTie Calculate (14.3%)
- Canon (13.1%)
- Kofax (9.2%)
- Nuance (8.4%)
- ABBYY (5.4%)

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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. Financial Cents took first in this category, providing firm workflow management tools that optimize firm profitability.

### Comprehensive Workflow

**WINNER: Financial Cents (39.6%)**

Runners Up:

- Thomson Reuters Practice CS Project Management (16.6%)
- CCH Axxess Workstream, CCH iFirm Practice Manager, or XCMworkflow (14.1%)

- OfficeTools WorkSpace by AbacusNext (7.3%)

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100%.

**WINNER: GruntWorx (13.2%)**

Runners Up:

- Intuit Tax Import or DMS for Lacerte and ProSeries (11.6%)
- Bill.com (9.4%)
- Thomson Reuters GoFileRoom/Practice CS/Workpapers CS (9.3%)
- Citrix ShareFile for Accountants (8.9%)
- Canopy (8%)
- OfficeTools WorkSpace by AbacusNext (7.7%)
- Various CCH ProSystem *fx* Systems (7.5%)
- SurePrep (7%)
- Expensify (6.9%)
- eFileCabinet (5.9%)
- Karbon Workflow Management (4.9%)
- SmartVault (4.9%)
- Doc.IT by IRIS (4.4%)
- Suralink (3.1%)
- Cabinet NG by PSIGEN (2.9%)
- Audit Dashboard (2.5%)
- Tallie (1.2%)

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## Website Builders & Services for Accounting Firms

**Insight:** A firm website, and social media presence, should be mandatory. These systems make it easy and affordable to create a firm website and keep it up-to-date.

## WINNER: GetNetSet (13.8%)

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- CCH SiteBuilder (5.5%)
- Build Your Firm (5.1%)
- Tenenz AFSB or Integer (5.1%)
- AccountantsWorld by IRIS Website Relief (4.4%)
- Network Management Group (NMGI) WebCare (3.9%)
- Other (13.9%)

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## Favorite CPE Provider

**Insight:** CPE isn't just a requirement, it's also a great way to keep up with the latest changes in tax, accounting, audit, and technology. And you can now get pretty much all of your CPE online at your convenience.

## WINNER: Surgent CPE (18.2%)

### Runners Up:

- CPAAcademy (13.1%)
- Drake CPE (12%)
- AICPA (9.1%)
- MyCPEwebinars (5.8%)
- NATP (5.2%)
- *CPA Practice Advisor* (4.9%)
- TheTaxBook (4%)
- TaxSpeaker (3.8%)
- Becker CPE (2.8%)
- NATP (2.7%)



- Canopy CPE (2.6%)

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## How Do You Prefer to Earn CPE?

**Insight:** While live online classes are clearly the ongoing trend, some professionals miss interaction with their peers and want in-person CPE events. Fortunately, there are many ways to earn CPE.

### WINNER: Live Online Classes/Webcasts (39.8%)

Runners Up:

- Self-Study with Tests (28.5%)
- In-Person Seminars/Workshops (23.6%)
- Other (17%)

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## Which Conferences Do You Attend?

**Insight:** Many state society shows are listed in the “other” category. Many respondents chose more than one event.

### WINNER: XeroCon (15.5%)

Runners Up:

- QuickBooks Connect (11.5%)
- NATP (8.3%)
- AICPA ENGAGE (Las Vegas) (5.6%)
- NAEA National Conference (3.6%)
- CCH Connections (3.1%)
- Digital CPA (2.9%)
- Thomson Reuters Synergy (2.8%)

- Sage Intacct/Summit (2.7%)

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- Toronto Accounting Show (0.8%)
- CSEA Super Seminar (0.6%)
- Other (26.1%)

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## SMALL BUSINESS ACCOUNTING SYSTEMS

**Insight:** QuickBooks is still the king in many of these categories. Note that there are several sub-categories in small business systems.

### Small Business Accounting – Installed Programs

**WINNER: Intuit QuickBooks Desktop (70.8%)**

Runners Up:

- Sage One, Sage 50 or Sage ERP (5.3%)
- PC Software Accounting Inc. (4.2%)
- A-Systems Visual Bookkeeper (3.3%)
- Acclivity (3%)
- Cougar Mountain Denali (2.7%)
- CheckMark Software MultiLedger (2.6%)
- RealEasyBooks (2%)
- Drake Accounting (1.9%)
- Red Wing Software CenterPoint (1.5%)
- Other (2.7%)

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## Online Small Business Accounting

## **WINNER: Intuit QuickBooks Online/Online Accountant (61.8%)**

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- Kashoo (2.6%)
- Wave (2.3%)
- KPMG Spark (2.2%)
- BizAutomation.com (1.3%)
- Zoho Books (1.1%)
- Workful (1%)
- Other (4%)

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## **Expense and Travel Management Solution**

**Insight:** Even though travel was way down in 2020, other operating expenses didn't change much, and they still need tracking for accounting and tax purposes.

## **WINNER: Expensify (23.9%)**

Runners Up:

- ReceiptBank (10.8%)
- Concur Expense (10.4%)
- Certify (6.4%)
- ExpensAble (5.7%)
- ExpenseWatch (5.4%)
- Tallie (5.3%)
- Zoho Expense (5.1%)
- SutiExpense (4.8%)
- Chrome River (4.7%)
- SpringAhead (3.7%)
- Xpenditure (1.7%)
- Other (12.1%)

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- Database Creations (4.2%)
- Celerant Command Retail (4.1%)
- CAM Commerce Retail STAR (3.5%)
- Radiant Systems (3.3%)
- AddSum (3.1%)
- Keystroke POS (2.8%)
- AccuPOS (2.7%)
- Wasp Barcode (2%)
- Vend POS (1.7%)
- Other (8.7%)

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**Not-for-Profit Accounting**

**WINNER: Intuit QuickBooks Premier Nonprofit (44.8%)**

Runners Up:

- Blackbaud Financial Edge or Fundware (6.9%)
- Araize (5.5%)
- Cougar Mountain FUND Suite (4.9%)
- Fund E-Z (4.7%)
- Aplos (4.6%)
- CYMA Systems (4.3%)
- GMS Software (3.9%)
- Abila MIP (3.3%)
- AccuFund (3%)
- Sage Intacct (2.8%)
- Open Systems TRAVERSE (2.2%)

- OneNFP (2%)

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#### Runners Up:

- Right Networks (19%)
- Drake Hosted by Right Networks (15.2%)
- AbacusNext Private Cloud and Cloudnine Realtime (10.9%)
- Thomson Reuters Virtual Office CS/SaaS (8.7%)
- CPAASP/InsynQ (4%)
- Network Alliance (3.9%)
- Cetrom CPA Cloud (3.9%)
- Network Management Group Inc. (NMGI) (3.3%)
- Other (6.8%)

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### Outsourced Technology Services

**Insight:** These companies offer a variety of hosting and outsourced business process services. Voters were allowed to select more than one, so totals exceed 100%.

#### WINNER: Ace Cloud Hosting (24.7%)

#### Runners Up:

- Right Networks (23.8%)
- CPA2Biz Email Solutions (10%)
- Network Management Group Inc. (NMGI) (7.1%)
- InsynQ/CPAASP (7.1%)
- CollBox (6.9%)
- Cloudnine Realtime by AbacusNext (5.7%)
- AppRiver (5.3%)

- Cetrom (3.4%)

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- HP (50.1%)
- Brother (31.1%)
- Canon (19.2%)
- Fujitsu (17.8%)
- Epson (12.7%)
- Dell (6.7%)
- Lexmark (5.2%)
- Xerox (4.8%)
- Samsung (3.3%)
- Sharp (2.1%)
- IBM (1.7%)
- NeatCo/NeatReceipts (1%)
- Sony (0.9%)
- Other (4.7%)

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## OUT-OF-OFFICE

### Favorite Form of Physical Exercise During Tax Season

**WINNER: "Who has time to exercise?" (46.2%)**

- Jogging/Running (10.3%)
- Walking (10%)
- Weightlifting (9.7%)
- Bicycling (9.2%)
- Jumping to Conclusions (8.6%)
- Yoga (8%)

- Aerobics (5.4%)

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**engagements or firm business while away from the office (at a client, at home or anywhere else)?**

- “My office is in my home or car:” 42.6%
  - Between 1-9 hours per week: 16.3%
  - Less than 1 hour per week: 16.1%
  - Between 10-19 hours per week: 9.8%
  - 20+ hours per week: 15.2%
- 

## **The Pandemic**

**How has the pandemic affected your firm's remote capabilities?**

- Except for a brief change, we've been back to normal for awhile (32.5%)
  - We adopted a mixed remote/in-office workforce (19.5%)
  - We were mostly/all 100% remote before pandemic (19%)
  - We went mostly/all remote and have stayed that way (16%)
  - We went mostly/all remote, but are close to pre-pandemic normal (7.3%)
  - Other (5.7%)
- 

**How “social” are you? Which social media tools do you use in conjunction with your work?**

About 45% of our voters said they don't use any social media tools for business purposes. They are missing out on great business opportunities that aren't difficult or expensive. So get on board! Multiple responses were allowed, so totals equal more than 100%:

- LinkedIn 56.6%

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If you have any questions or need help you can email us

- Reddit 5.3%
- SnapChat 4.7%
- Vine 1.5%
- Don't use any social media for business 45.9% (you're missing business opps!)
- Other 2.2%

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Thank you to the more than 5,000 tax and accounting professionals who participated in this year's Readers' Choice Awards.

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