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workflows their peers use and trust, which can help them build more efficient and profitable workflows for their own practice.

Isaac M. O'Bannon • Apr. 17, 2023



While the economy and supply chains may still have some hiccups related to the end of the pandemic, one thing is clear: The demand for the services of accounting, finance, and tax professionals is growing strong. Unfortunately, there's also a "critical talent shortage," says Tom Hood, CPA, executive vice president of business engagement and growth with the AICPA. (<https://www.linkedin.com/pulse/case-accounting-finance-high-demand-occupation-hood-cpa-cgma-citp>).

During the pandemic and since, however, accounting professionals and firms have

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corporate roles, a way to spotlight the technologies they've found to be most useful in running their practices or helping them provide services to clients, in addition to client-side systems that may help streamline the relationship with the firm. Categories for this year's awards range from online tax, research, and accounting systems, to remote engagement, practice management, document automation, workflow tools, apps for collaboration, mobile productivity, and more. And yes, office hardware such as printers, scanners, and other devices still remain an integral component for successful practices, even as they become more digitized.

The Readers' Choice awards also give professionals the chance to see which technologies and workflow systems their peers are using and trust, which 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: As was true in every year of voting, the tax prep system category is always the most voted-on, with nearly all respondents selecting a preferred system. Also in keeping with recent years, Drake Software continues to inspire the users of its tax prep, planning, management and other systems to vote in high numbers. The result: Drake wins this category again this year, showing the loyalty many professionals have for this company's tax systems.

WINNER: Drake Tax Software (37.1%)

Runners Up:

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Tax Planning Systems

Insight: Major tax law changes seem to be an almost annual occurrence, which can make tax planning a challenge, especially for higher net worth clients, or those planning major life events. But even basic tax planning can make a big difference in reducing future tax liability. This makes having a reliable tax planning system that can look forward several years a valuable addition to a practice. Drake Software's supporters turned out in full-force once again to cast their votes. Only about half of our 5,200+ voters reporting using a planning system, but of those who did, the voting results were:

WINNER: Drake Tax Planner (53.6%)

Runners Up:

- Intuit Lacerte Tax Planner (16.9%)
- Thomson Reuters Checkpoint or Planner CS (7.1%)
- Wolters Kluwer CCH ProSystem *fx* Planning (7.1%)
- Bloomberg Tax Income Tax Planner (4.8%)
- Corvee Tax (2.3%)
- MyTaxPrepOffice (2.1%)
- Other (6.1%)

Specialty Systems & Tax Prep Tools

Insight: Sometimes a professional tax preparation system still lacks a few specific

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- GEN Access and ProSystem/x Products (Worlde's Ruler) (14.2%)
- Canopy Tax Resolution Services (6.4%)
- SafeSend Returns (5.6%)
- Thomson Reuters UltraTax CS Source Doc Processing (4.3%)
- SurePrep 1040SCAN & TaxCaddy (3%)
- Taxfyle (1.4%)
- Sageworks E-Tax Return Reader (1.3%)
- DynaTax (1.1%)
- Bloomberg Tax 709 & 706 Preparer (0.3%)
- Other (15.7)%

Tax & Accounting Research Systems



Insight: Knowing what you don't know, but knowing where (and how) to find the answers is a critical skill, and much better for client returns, since clients often don't know what they don't know (when it comes to taxation), and also don't know where (or how) to search. This makes a reliable tax research utility powerful and valuable to a tax professional. Comprehensive research systems should include 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 can even integrate with tax preparation systems, while others are used separately, but alongside. About 35% of our readers voted in this category, and voters were allowed to vote for multiple products (and therefore, results total over 100%).

WINNER: TheTaxBook – Tax Materials Inc. (56.3%)

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- Tax Talk Today (4%)
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Tax Document Automation

Insight: Automation has been one of the core concepts in driving greater productivity at tax and accounting firms, helping them do more with less, by streamlining many functions, including 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: GruntWorx Populate (25.7%)

- Intuit Tax Import for Lacerte & ProSeries (21.5%)
 - SafeSend Returns (8%)
 - Wolters Kluwer CCH iFirm or ProSystem fx Scan (7.9%)
 - Canopy Tax (6.9%)
 - Thomson Reuters Source Document Processing & Workpapers CS (4.7%)
 - SurePrep 1040Scan Pro, 1040Scan Organize (3.6%)
 - Corvee (2.2%)
 - Other (19.5%)
-

Sales & Use Tax Preparation

Insight: – Sales taxes have been steadily growing more complex, and in the wake of the Wayfair ruling and states getting more aggressive in sales tax audits, these services are in greater demand

by clients. While the simplest of retailers can

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only, not the percentages:

WINNER: Avalara AvaTax, Avalara Returns

Runners Up:

2. CCH Wolters Kluwer (SureTax/SalesTaxOffice)
3. CFS Tax Software
4. eFileSalesTax.com
5. Bloomberg Tax Sales Tax Rates
6. Thomson Reuters ONESource Indirect Tax
7. TaxJar
8. Sovos Tax Solutions
9. Vertex Inc.

Sales & Use Tax Exemption Certificate Management

Insight: One of the highest sales tax audit risks (after non-compliance) involves management of exemption certificates. Businesses that occasionally or routinely make sales to purchasers who are exempted from sales taxes must maintain a record of these certificates and ensure they are up-to-date. Although most firms in our survey did not express a preference or personal use with these products, those who did voted as follows:

WINNER: Thomson Reuters ONESOURCE (35.2%)

Runners Up:

- Avalara CertCapture (22.8%)
- Vertex Inc. Exemption Certificate Manager (13.8%)
- Sovos Tax Solutions (11%)

- Other (17.2%)

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Insight: While online accounting systems have changed how many professionals think about write-up, the basics are still the same: Periodically reconciling a business' bookkeeping to ensure accuracy is an essential function in financial management and fraud prevention.

WINNER: Intuit QuickBooks Accountant (52.5%)

Runners Up:

- Drake Accounting (20.6%)
- Thomson Reuters Accounting CS (4.3%)
- Sage Intacct or Sage One (3.8%)
- Xero (2.8%)
- Client Accounting Suite (Wolters Kluwer) (2.4%)
- AccountantsWorld by IRIS Accounting Power (2.2%)
- AccountingSuite (2%)
- PC Software Accounting Inc. (1.1%)
- CYMA Systems (0.8%)
- Visual Bookkeeper (0.6%)
- LeaseCrunch (0.4%)
- UBCC Real Time Accounting (0.1%)
- Other (6.4%)

Audit Engagement Tools

Insight: Cloud, automation and remote technologies have greatly increased audit efficiency and accuracy, and the result is that engagements no

longer take weeks or months to conduct. Voters



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- CCH ProSystem|x Knowledge Coach, CCH ProSystem|x Engagement, CCH Accounting Research Manager or CCH Audit Accelerator (13.4%)
- Audit Confirmations (7.7%)
- CaseWare IDEA (6%)
- Audit Dashboard Automated PBC (5.6%)
- Suralink (5.6%)
- Confirmation.com (5.1%)
- Capital Confirmation (3.6%)
- Teammate Analytics (2.6%)
- OnPoint PCR (2.4%)
- Wiley Advantage Audit (2%)
- Rivio Clearinghouse (1.7%)
- Other (13.3%)

Business Valuation

Insight: Business valuation 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: ProfitCents Valuation Solution (*formerly SageWorks*) **(31.8%)**

Runners Up:

- ValuSource Pro, BVM Pro & Express Business Valuation (23.6%)
- MoneySoft Corporate Valuation Pro, DealSense & Business Valuation Specialist (18%)
- ValuAdder (12.2%)

- Other (14.4%)

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become more vigilant as well, so strong asset management is a must-have.

WINNER: Intuit ProSeries Fixed Asset Manager (28%)

Runners Up:

- Thomson Reuters Fixed Assets CS (19%)
- CCH Fixed Assets Manager or CCH ProSystem *fx* Fixed Assets (10.5%)
- Sage FAS Asset Accounting (9%)
- Bloomberg Tax Fixed Assets (6.6%)
- Pro-Ware Asset Keeper (5.7%)
- MultiView Asset Management (2.4%)
- Open Systems (2.3%)
- Real Asset Management Inc. (2.3%)
- Wasp Barcode Technologies (0.8%)
- Other (13.4 %)

Payroll



Insight: There are dozens of payroll systems on the market, but not all provide accounting firm modules for managing multiple clients, or at least accountant access to reporting tools. These awards and our reviews focus on those systems that can be beneficial to accounting firms or their interactions with clients, even if the client manages data entry and the firm is in more of a review and oversight role.

WINNER: QuickBooks Payroll – by Intuit* (29.7%)

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- Thomson Reuters Accounting CS Payroll or myPay (2.1%)
- Patriot Software (1.8%)
- AMS 1099-Etc Payroll (1.8%)
- CFS (1.4%)
- CheckMark Payroll (1%)
- PayCom (0.8%)
- OnPay (0.8%)
- Other: (12.6%)

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

1099/W-2 Compliance

Insight: Professional W-2 and 1099 systems allow firms to manage the year-end payroll and contractor reporting requirements for multiple clients, and include 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 55% of our voters reported using a professional wage reporting system.



WINNER: Drake Accounting (22.5%)

Runners Up:

- eFile4Biz (7.3%)

- Track 1099 (5.6%)

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Accountants voted by the firm category (2016)

- EagleView (2.7%)
- Payroll Compliance Reporting (Wolters Kluwer) (1.7%)
- Tenenz Laser Link/TFP (1.4%)
- American Riviera Magtax (1%)
- Convey Compliance (0.9%)
- FormMagic – Tax-Mate (0.7%)
- EG Systems W2/1099 Filer (0.5%)
- Spokane Computer MAG-FILER (0.3%)
- Other: (20.7%)

Time & Billing

Insight: Even firms that don't bill by the hour can find time and billing management systems to be a valuable addition, helping them better manage staff and firm resources more profitably, increase efficiency, and identify bottlenecks in workflow. (Multiple selections were allowed, thus resulting in a total of over 100%).



WINNER: QuickBooks Time (*formerly TSheets*) (53.3%)

Runners Up:

- Bill (*formerly Bill.com*) (12.7%)

- Canopy Practice Management (7.4%)

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- CCH Axcess Practice, iFirm Practice Manager or ProSystem fx (Wolters Kluwer) (2.3%)
- Mango Practice Management (2.3%)
- ClockShark (2.2%)
- Thomson Reuters Practice CS (2%)
- Chrometa (1.6%)

Practice Management

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



WINNER: OfficeTools by CARET (*formerly AbacusNext*) (12.6%)

Runners Up:

- Thomson Reuters Practice CS (12.2%)
- CCH Axcess Practice, CCH iFirm Practice Manager, CCH ProSystem fx (11.8%)
- TaxDome (11.1%)
- Canopy Tax Practice Management (9.1%)
- ClientWhys/TaxBuzz.com (6%)
- TaxWorkFlow (4.1%)
- Financial Cents (3.9%)
- Karbon Workflow Management (3.8%)
- XCM Workflow (2.7%)

- Mango Practice Management (2.2%)

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Online Invoicing/Bill Payment Solutions

Insight: Online invoicing and bill payment systems can help streamline AP and AR, reducing cashflow logjams. Voters were allowed to select more than one, so totals exceed 100%.

WINNER: Intuit Payments (35.8%)

Runners Up:

- PayPal (15.9%)
- Bill (*formerly Bill.com*) (8.9%)
- CPACHarge by Afffinipay (7.4%)
- Invoiced (6%)
- Bill & Pay (5.4%)
- OfficeTools by CARET (*formerly AbacusNext*) (4.8%)
- Xero (3.6%)
- Zoho Books (2.8%)
- Sage Payments (2.7%)
- FreshBooks (2.2%)
- BizPayO (1.9%)
- CorPay (1.5%)
- CollBox (1.2%)
- ReceiptBank (1.2%)
- Other: (21.7%)

Client Portals



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WINNER: Drake Software Drake Portals (35.6%)

Runners Up:

- DropBox (8.5%)
- Citrix ShareFile (5.4%)
- TaxDome (5.1%)
- CCH Axxess Portal / CCH ProSystemfx Portal / CCH iFirm or XCM Solutions (3.7%)
- Canopy (3.1%)
- MyTaxPrep Office (3.1%)
- SafeSend Returns/Exchange (3.1%)
- CPASiteSolutions (3.1%)
- SmartVault (2.7%)
- Thomson Reuters NetClient CS Portals or Onvio (2.6%)
- ClientWhys/TaxBuzz.com (2.2%)
- OfficeTools Client Portal from CARET (*formerly AbacusNext*) (1.9%)
- Verifyle (1.9%)
- AccountantsWorld by IRIS CyberCabinet (1.9%)
- Suralink (1.8%)
- Box (1.5%)
- Audit Dashboard (1%)
- eFileCabinet SecureDrawer (1%)
- Doc.IT by IRIS Web Client Portal (0.7%)
- XCMportal (0.4%)
- Mango Practice Management (0.4%)
- Huddle (0.3%)
- File Genius (0.2%)
- FileThisPro (0.2%)

- Other (8.6%)

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Runners Up:

- Intuit ProSeries & Lacerte DMS (7.4%)
- Thomson Reuters FileCabinet CS/GoFileRoom (6.3%)
- TaxDome (5%)
- CCH Axcess Document or CCH ProSystem *fx* Document (4.6%)
- eFileCabinet (2.7%)
- SmartVault Document Storage (2.6%)
- Suralink (2.2%)
- ClientWhys/TaxBuzz.com (2%)
- MyTaxPrepOffice (1.8%)
- Doc.IT by IRIS – Doc.IT DM (1.7%)
- AccountantsWorld by IRIS Cloud Cabinet (1.6%)
- Cabinet SAFE CLOUD (1.2%)
- OfficeTools Workspace by CARET (*formerly AbacusNext*) (1%)
- Canopy (1%)
- DropBox (0.8%)
- FileCenter (0.8%)
- Conarc iChannel (0.8%)
- PaperlessPLUS (ATX) (0.6%)
- DocuLex (0.3%)
- Personable (0.2%)
- Other (9.3%)

Other Document Management Tools

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Runners Up:

- HP (29.6%)
 - Canon (16.1%)
 - cPaperless TicTie Calculate (11.8%)
 - Nuance (5.9%)
 - Kofax (5.2%)
 - ABBYY (4.5%)
-

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 Firm Workflow Solutions

WINNER: Thomson Reuters Practice CS Project Management (18%)

Runners Up:

- TaxWorkFlow (16.5%)
- CCH Axxess Workstream, CCH iFirm Practice Manager (13.9%)
- TaxDome (13.6%)
- Financial Cents (7.4%)
- Pascal Workflow (7.4%)
- XCMworkflow (5.5%)
- Autonomy iManage Workflow Manager (2.6%)

- Other (15.1%)

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- Intuit Tax Import or DMS for Lacerte and ProSeries (11.3%)
- OfficeTools WorkSpace by CARET (*formerly AbacusNext*) (10.3%)
- Various CCH ProSystem *fx* Systems (9.7%)
- Citrix ShareFile for Accountants (8.7%)
- Bill (*formerly Bill.com*) (7.8%)
- Thomson Reuters GoFileRoom/Practice CS/Workpapers CS (7.1%)
- Canopy (6.6%)
- Expensify (4.9%)
- TaxDome (4.5%)
- eFileCabinet (3.9%)
- SmartVault (3.6%)
- Suralink (3.5%)
- Audit Dashboard (3.5%)
- Doc.IT by IRIS (3%)
- Karbon Workflow Management (2.5%)
- SurePrep (2.4%)
- Cabinet NG (1.5%)
- Tallie (0.5%)

Website Builders & Services for Accounting Firms

Insight: There are several website services and tools that make it easy and affordable to create a firm website and keep it up-to-date. Options range from doing most of the work yourself with a variety of templates, to solutions where the vendor does all the work you want them to do.

WINNER: Drake Software SiteDart Website Services (19.8%)

Runners Up:

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- Rootworks (2.7%)
 - Tenenz AFSB or Integer (2.7%)
 - GoDaddy (2.6%)
 - Wix (1.8%)
 - TaxDome (1.6%)
 - Network Management Group (NMGI) WebCare (1.3%)
 - Other (14.1%)
-

Favorite CPE Provider

Insight: Got CPE? Well, there are many ways to earn it these days, and it is little surprise that professionals increasingly turn to online options.

WINNER: Drake CPE (15.9%)

Runners Up:

- CPAAcademy.org (13.5%)
- *CPA Practice Advisor* (9.5%)
- AICPA (9%)
- MyCPEwebinars (6%)
- Surgent CPE (4.8%)
- NATP (3.4%)
- Canopy Tax CPE (3%)
- TaxSpeaker (2.5%)
- NASBA (2%)
- Becker CPE (1.8%)
- TheTaxBook (1.4%)

- Sequoia (1.3%)

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Insight: Online CPE might be growing in preference, but there are clearly still many professionals who prefer other methods. (Voters could choose more than one.)

WINNER: Live Online Classes/Webcasts (43.9%)

Runners Up:

- Self-Study with Tests (39.5%)
- In-Person Seminars/Workshops (24.8%)
- Other (3%)

Which Conferences Do You Attend?

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

WINNER: QuickBooks Connect (14.4%)

Runners Up:

- XeroCon (7.2%)
- AICPA ENGAGE (Las Vegas) (5.2%)
- NAEA National Conference (4.8%)
- Digital CPA (3.7%)
- CCH Connections (3.7%)
- IRS conferences/forums (3.7%)
- Thomson Reuters Synergy (3%)
- NATP (2.8%)
- Sage Intacct/Summit (2.6%)
- FICPA Florida Show (1.8%)

- Scaling New Heights (1.7%)

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Insight: QuickBooks is still the choice of most small businesses, with a dominating market share in several client-side technology categories.

Small Business Accounting – Installed Programs

WINNER: Intuit QuickBooks Desktop (77.2%)

Runners Up:

- Sage One, Sage 50 or Sage ERP (5.7%)
- PC Software Accounting Inc. (3.1%)
- Cougar Mountain Denali (1.8%)
- A-Systems Visual Bookkeeper (1.6%)
- CheckMark Software MultiLedger (1.6%)
- Acclivity (1.2%)
- RealEasyBooks (0.9%)
- Drake Accounting (0.8%)
- MyTaxPrepOffice (0.8%)
- Red Wing Software CenterPoint (0.6%)
- TaxDome (0.4%)
- Other (4.3%)

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Online Small Business Accounting

WINNER: Intuit QuickBooks Online/Online Accountant (69.9%)

Runners Up:

- Xero (3.9%)

- AccountantsWorld by IRIS Accounting Power (2.6%)

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- BizAutomation.com (0.8%)
- Sage 50 (0.5%)
- OnBalance Express (Thomson Reuters) (0.4%)
- AccountingSuite (0.4%)
- Workful (0.3%)
- Other (4.3%)

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Expense and Travel Management Solution

WINNER: Expensify (19.7%)

Runners Up:

- Concur Expense (12.2%)
- Dext (*formerly Receipt Bank*) (8.2%)
- Zoho Expense (7%)
- Certify (6.1%)
- Chrome River (6%)
- CorPay (5.6%)
- ExpenseWatch (4.4%)
- ExpensAble (4.3%)
- Tallie (4%)
- Xpenditure (2.5%)
- SpringAhead (2%)
- SutiExpense (1.7%)
- Other (16.3%)

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• CAM Commerce Camurus/Retail STAR (2.2%)

• Cougar Mountain Denali POS (1.9%)

• AccuPOS (1.8%)

• Radiant Systems (1.7%)

• AddSum (1.4%)

• Keystroke POS (1.2%)

• Vend POS (0.9%)

• Wasp Barcode (0.3%)

• Other (12.2%)

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Not-for-Profit Accounting

WINNER: Intuit QuickBooks Premier Nonprofit (60.2%)

Runners Up:

• Sage Intacct (5.4%)

• Aplos (4.2%)

• Blackbaud Financial Edge or Fundware (3.4%)

• GMS Software (2.9%)

• Cougar Mountain FUND Suite (2.7%)

• Araize (2.4%)

• Abila MIP (2.3%)

• Fund E-Z (2.2%)

• CYMA Systems (2%)

• AccuFund (1.9%)

• Open Systems TRAVERSE (1.1%)

• OneNFP (1%)

• Serenic Navigator (0.7%)

- Other (7.6%)

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- Ace Cloud Hosting (25.8%)
- Right Networks (16.5%)
- Thomson Reuters Virtual Office CS/SaaS (6.4%)
- Cetrom CPA Cloud (4.9%)
- Private Cloud and Cloudnine Realtime by CARET (*formerly AbacusNext*) (2.7%)
- Verito (1.5%)
- LeaseCrunch (1.3%)
- Network Alliance (1.2%)
- Network Management Group Inc. (NMGI) (0.9%)
- CPAASP/InsynQ (0.7%)
- Other (8.4%)

Outsourced Technology Services

Insight: These companies offer a variety of hosting and outsourced business process services.

WINNER: Ace Cloud Hosting (38.4%)

Runners Up:

- Right Networks (27.6%)
- Cetrom (7%)
- Network Management Group Inc. (NMGI) (5.1%)
- CPA2Biz Email Solutions (4.2%)
- AppRiver (3.1%)
- CollBox (2.6%)
- Cloudnine Realtime by CARET (*formerly AbacusNext*) (2.1%)

- InsynQ/CPAASP (2.1%)

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- Canon (18.7%)
- Fujitsu (14.2%)
- Epson (13.5%)
- Dell (7%)
- Xerox (4.2%)
- Lexmark (3.7%)
- Samsung (3.1%)
- Sharp (1.8%)
- IBM (1.3%)
- Sony (0.9%)
- NeatCo/NeatReceipts (0.8%)
- Other (5.1%)

OUT-OF-OFFICE

Favorite Form of Physical Exercise During Tax Season (More than one selection was allowed).

WINNER: "Who has time to exercise?" (45.2%)

- Jogging/Running (11.6%)
- Weightlifting (10.4%)
- Bicycling (10.1%)
- Yoga (9.1%)
- Jumping to Conclusions (8.8%)
- Aerobics (6.8%)
- Team Sports (3.2%)
- Racket Sports (2.6%)

- Other (22.8%)

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

About 41% of our voters said they don't use any social media tools for business purposes. Multiple responses were allowed, so this totals to more than 100%:

- Facebook 39.7%
- LinkedIn 33.9%
- YouTube 17.1%
- Instagram 16.3%
- Twitter 12.5%
- WhatsApp 12%
- Pinterest 5.3%
- TikTok 5%
- SnapChat 3.8%
- Yelp 3.2%
- Reddit 2.7%
- Vine 0.3%
- Don't use any social media for business: 40.6%
- Other

Thank you to the more than 5,200 tax and accounting professionals who participated in 2023 Readers' Choice Awards.

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