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CPA Practice Advisor

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August 2012
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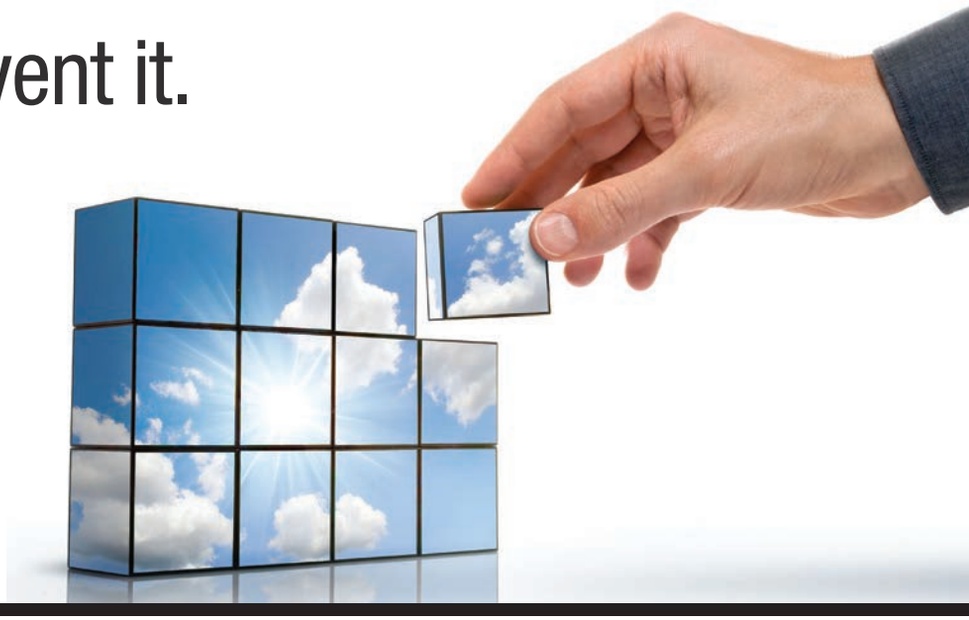

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CPA Practice Advisor
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CYGNUS BUSINESS MEDIA
BPA WORLDWIDE
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It's a Niche World

It seems like every conference I attend, I hear someone talking about the niche business model. It's the hot topic these days, and for good reason. Firms that have adopted this model are enjoying standardized processes, higher revenues, and operating at peak efficiency. Of course, the niche model certainly isn't a new concept, but for some reason it has taken longer to emerge in the accounting profession. However, despite a late arrival, the niche business model is infiltrating the profession. And trust me…it's here to stay.

I am an outspoken advocate of the niche model because it's one that I implemented in my own firm with great success. Years ago I decided that I needed to "define" my firm; that is, figure out what services I was good at providing and the type of clients I wanted to serve. Like many other firms, I held on to a "take-any-client-that-comes-through-the-door" mentality. Because I lived in constant fear of losing clients, I worked to consistently onboard new clients… no matter the industry or service level. The only thing I accomplished by doing this was working long hours trying to please a diverse client base with vastly different needs.

Eventually, I figured out that by not having a defined business model, it was my clients who defined my firm's workflow processes. Because I was trying to serve so many different types of clients, I was unable to standardize any process. The end result was a lot of chaos and wasted billable hours. So, I took a step back from the anarchy, conducted an honest evaluation of my firm, and started to define what I wanted my firm to look like.

> BY SERVING ONLY SELECT NICHE MARKETS, I WAS AS ABLE TO GAIN EXPERTISE IN A FEW INDUSTRIES, MASTER THE ACCOUNTING NEEDS OF EACH, AND IMPLEMENT UNIFORM PROCESSES FOR SERVING EACH NICHE.

I knew that if I was to regain control of my firm and lead my clients instead of my clients leading me, I needed to simplify things. That's when I adopted the niche business model. By serving only select niche markets, I was as able to gain expertise in a few industries, master the accounting needs of each, and implement uniform processes for serving each niche. Over time, my firm transitioned from a state of disorder into a highly efficient operation. Most importantly, by defining my client base, I got to select the clients I *wanted* to serve and enjoyed working with. And it's a really great feeling to go into work when you enjoy the clients you serve!

The accounting profession may be a bit slow to adopt new concepts, but we certainly know a good thing when we see it. And the niche business model is a keeper—offering firms the power to define their business and their clientele. For those who have yet to research this model, I'm here to confirm that it is indeed a niche world. ●

M. Darren Root, CPA.CITP
Executive Editor

Darren is the Executive Editor of CPA Practice Advisor. He remains in public practice as the principal of Root & Associates, LLC, in Bloomington, Indiana, and is president of his consulting practice, RootWorks. He formerly served on the Board of the AICPA's CITP Credentials Committee and is a former member of the Board of Directors for the Indiana CPA Society. He speaks at dozens of professional organizations each year and frequently serves as a guest lecturer at Indiana University's Kelley School of Business.

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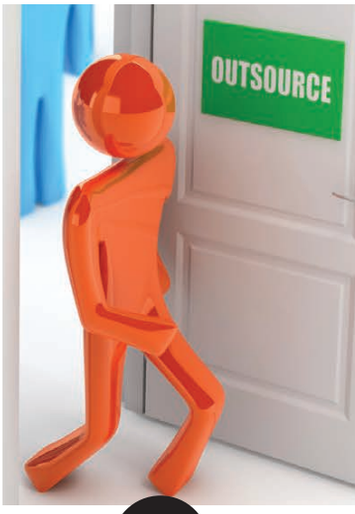

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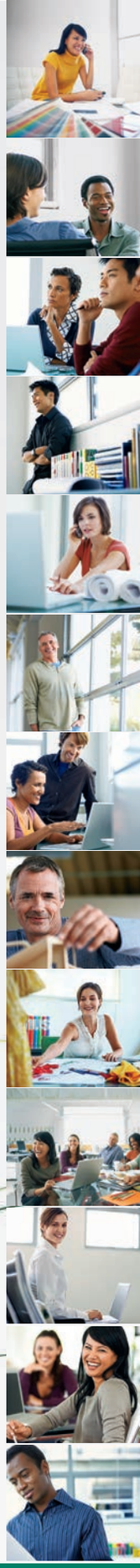

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CPA Practice Advisor Goes Around the World

Our Readers Took Us on Vacation

Earlier this year, we challenged readers of CPA and NSA Practice Advisor to "take us on vacation with them," by submitting a photo of themselves holding either the print or digital issue of the magazine from wherever they might travel. One winner would then be randomly selected from the submissions, and would receive a travel voucher valued at $1,500, which they could put toward their next vacation.

We received submissions from those in and around the tax and accounting profession, and from their travels across the country and around the world. The randomly chosen winner of the vacation photo contest, and the travel prize, is Ted Davidson, AVA, of SPARDATA Value Advisors, a firm that aids accountants, financial advisors and businesses by providing business valuation and transition expertise.

Davidson had his photo taken while traveling to the African nation of Tanzania, which is home to Lake Victoria (Africa's largest lake) and was where Dr. Jane Goodall studied. During Davidson's travels, he visited with a close friend who is serving with the Peace Corps, teaching elementary and high school students in the town of Ilembo. The photo shows some of the children gathered around Davidson as he holds a recent copy of *CPA Practice Advisor.*

"Many of her students' children come to her house after school because she supplies them with crayons and paper to draw on," Davidson said. "Once they have completed their drawings, they show them to my friend Anna and she presents them with the ultimate reward: a sticker! They wear them proudly on their foreheads – very adorable!"

Davidson says the children were very curious about the magazine. "I'll remember these kids for a long, long time!"

Other reader submissions came in from places as varied as Europe, the Bahamas and even the Grand Tetons. The editors have selected those they thought were the best, which can be viewed at www.CPAPracticeAdvisor.com/10742252.

Did you know that *CPA Practice Advisor* is also available in a digital edition? Some of our readers submitted photos of themselves holding their iPad or mobile phones with the latest digital edition, which has the look of the print version, but offers quick links to articles, search functions, and is easy to download and share. The latest digital issue can be viewed at http://cpapracticeadvisor.epubxp.com/title/10125.

See more vacation photos at www.CPAPracticeAdvisor.com/10742252

SPECIAL ISSUES COMING SOON

- **Women in Accounting — NOVEMBER ISSUE**
- **Awesome Add-ons — NOVEMBER ISSUE**

The Awesome Add-on Awards, Presented by The Sleeter Group

The Sleeter Group awards the Awesome Add-ons each year to products that aid small businesses and their accounting firms by providing enhanced capabilities that integrate with small business accounting systems. CPA & NSA Practice Advisor partners with The Sleeter Group in presenting the Awards at the annual Accounting Solutions Conference.

- **Executive Predictions & Year in Review — DECEMBER ISSUE**

2013 Executive Predictions & 2012 Year In Review

In every issue of *CPA Practice Advisor* Magazine

- Small Business Accounting
- Cloud/Hosted Strategies
- Branding and Marketing Strategies
- Mobile and Digital Strategies
- Small Business Advisor

HERE'S A SNEAK PEEK AT THE SEPTEMBER EDITION:

- **In-Firm Employee/Staff Management:** The Human Capital Factor
- **How to Evaluate** Hosted Providers
- **Firm Marketing/Newsletter Tools:** Why You Don't Have to Re-Invent the Wheel
- **How** Today's Mobile Professionals Are Using Portals
- **Monthly Micro Apps**
- **Client Accounting Online:** Plug-ins for Your Shared Spaces
- **How to** Help Your Small Business Clients with HR Management
- **40 Under 40**

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For more information about any of these upcoming issues, please contact your account representative

800-547-7377

The Dumbing Down of Search Engines

Google has long been the undisputed default search engine, far exceeding competitors like Yahoo!, Bing and an assortment of lesser known websites. But just as Google's search functionality is mimicked or outright plagiarized (imitation being flattery, of sorts), the company faces challenges similar to those faced by Microsoft and giant corporations in other industries.

That is, the bigger a company, the bigger the target it makes, and as one of the largest technology companies in the world, Google is often at the heart of technology debates. Particularly with regard to how user data is stored and shared with other companies, as well as in how it performs and presents searches with sponsored listings included. Then there are the people who criticize Google for potentially (at least in their view) infringing on copyright and intellectual property rights via Google Books.

Isaac M. O'Bannon, Editor

Isaac is the Editor for CPA Practice Advisor, having joined the publication in September 2002. Through his experience in the areas of consumer and professional-level software and peripherals, as well as knowledge of the public accounting field, he provides reviews of technologies used by accountants and their business clients as well as contributing a regular column that provides helpful information that ranges from improving search techniques to when to upgrade a computer to computing security issues. He can be reached at isaac.obannon@cpapracticeadvisor.com.

These are only a few of the complaints, justified or not, that the company faces. (A search for "why I hate Google" returns 170,000 hits… on Google.) Nevertheless, it remains by far the most successful search utility, and the addition of Google Apps, Maps, Google+ (which hasn't really caught on), and several acquisitions has made the company's services more and more of a daily resource for hundreds of millions of people around the world. It's also likely that many of these Google naysayers continue to use various apps from the company because, well, most people resist change.

While I've never really loved Google, I am not one of the "hate Google" people. However, I am falling out of like with them, and it's not because of any of the above issues. It's about their core function: Search. Despite being the ubiquitous search tool and earning a place in our language (nobody Yahoos or Bings something, but most of us Google something daily), my biggest fault with Google has been what I see as a decline in its actual search functionality over the past few years.

The Dumbing Down of Search

Google's search functionality has declined, but has likely only been noticed by more experienced and skilled searchers. That's because the search methodology that has been the standard for computers and the Internet for the past 18 years has been removed from Google. The Boolean (advanced) search technique is simply a way of using "the, " "and" or minus symbols and quotation marks to tell the search engine more specifically what you're looking for.

For instance, simply typing in *Treasury Regulations 7216 disclosure* results in 667,000 results. That's good, but too many to be useful unless you get lucky, because all the search engine is really doing is searching is any document with some (not necessarily all) of the words mentioned, and in any order. If you're just surfing, perhaps that's enough, but not if you're looking for something very specific. With an advanced search of **+"Treasury Regulations" +7216 +disclosure**, (including the + symbol and quotation marks), you are telling a search engine that you only want documents that contain the exact phrase "Treasury Regulations" **and also** 7216 and the word disclosure.

With the dumbing down of Google's search engine, this traditional advanced search method is longer supported. A search using the above example with quotation marks and plus symbols will result in zero hits in Google. Most other leading search engines still support the method, however. Using that search on Yahoo! returns 6,830 hits; on Bing it returns 7,620. You could narrow these down even further with additional "must-have" words and phrases, such as consent, penalty or CPA or EA.

Why Did Google Do This?

This was a strategic move on the part of Google, the goal being to make web searches easier for people who aren't good at searching. While that's a good thing, I think they should have handled it differently. Surprisingly, college students are among the worst when it comes to effective search engine use.

Several recent studies (http://tinyurl.com/3hhvv2u) have shown that, although the under 25 age range has grown up with computing technology and are native users of online tools from before many can even walk, this doesn't equate to knowing how to use those same technologies for actual work. In short, they are having to learn how to use their gadgets as tools instead of toys. Whereas older tech-savvy users have long adopted these technologies with a goal of productivity.

The younger market is, of course, the primary target for most technology companies, so engineers and developers have long aimed to make computers and programs more user friendly, but unfortunately, by making search engines think like humans, they are basically just dumbing down the systems.

Yes, there are other search functions in Google and an advanced search page, but Google's abandonment of the standard advanced search methodology used across all search engines for 18 years is the prime example. The developers didn't even leave it in as an option. Which means that users will either have to learn multiple search techniques for every different search engine they use, or as Google may be hoping, the users will grow used to only the Google way, relying only upon the single search engine. ●

REVIEW SECTIONS

BASIC SYSTEM FUNCTIONS
- Installation Ease
- General Navigation & Ease of Use
- Industry-Specific Templates
- Industry-Specific Features
- Platform Support

CORE ACCOUNTING CAPABILITES
- GL/AP/AR Functionality
- Sales Tax Functionality
- Payroll Functionality
- Audit Trail
- Multi-Currency
- Multiple Language Support
- Multi-Location Support
- Multiple Users

DAY-TO-DAY OPERATIONS
- Sales/Point of Sale/Shipping
- Customer/Vendor Employee Management
- Inventory/Purchasing
- e-Features
- Remote Access

MANAGEMENT FEATURES
- Dashboard Overviews
- Reporting
- Security Features
- Integration/Import/Export
- Data Transfer
- External Integration
- Online Accountant Transfer Tool

HELP/SUPPORT
- Built-in Support Features
- System Updates
- Support Website/Documentation
- U.S.-Based Support

SUMMARY & PRICING

How to Find the Right Point-of-Sale System for Any Small Business

Like all technology, POS/Retail Systems change faster than many business owners are prepared for. Retailers, like all of us, can get into their own comfort zone, and while there are a select few that are first in line for the latest technology, gizmo, or gadget, the vast majority of business owners are content to use the software they've always used. It's not that they hate technology, we just hate change.

But in order to survive and thrive in the retail world, retailers must learn to adapt to change, embrace it, and welcome it with open arms. Because even if they don't, you can be sure that their competition will.

With many smaller retailers struggling to compete with corporate big-box stores, it's essential to use whatever is necessary to remain not only competitive, but in business.

While many industries have made it a practice to become more responsive to customers, in the retail world, the customer is the business. Without a customer, there is no business.

So many retailers are looking at ways to make their customers happier. Once this decision is made, retail managers begin to see their business in a different light. Can my competition ring up their customers faster than I can? Are my checkout lines longer because I have more customers, or because my cash register is 10 years old and not able to keep up with the longer lines? Can my customers go to my website and order a product and have it shipped to them? Do I have a website? Does my website integrate with my brick and mortar location? Can I accept foreign currency, or do I have to turn down a sale from foreign customers?

There are so many questions that retail managers begin to ask themselves, and finding the answers isn't always easy.

Retail clients count on the expertise of those guiding them financially. But they must do their part as well; by determining what they are looking for in a POS system.

Retailers typically fall into very general categories. The grocery store manager will tell you that his needs are very different from those of the gift shop down the street. The restaurant manager will have very specific requirements when purchasing POS software, and they will be very different from the high volume retailer with the awesome website.

> WITHOUT A CUSTOMER, THERE IS NO BUSINESS.

Determining need is an important step in finding the right POS software product.

While smaller systems can be tweaked enough to suit the majority of smaller retail businesses, larger stores and high-volume entities such as convenience stores will need a product that can be custom designed for their operation.

For this review, we looked at the availability of a long list of system functions, including basic system functions which include ease of use, module availability, multi-store support, multiple pricing levels and the availability of advanced retail functions such as warehouse management, distribution centers, e-commerce functionality, and web-based order entry.

We also looked for specialized features such as touch screen technology, multiple tender options, customer management, and niche market services such as gift cards, coupons, gift registries, and food stamp/EBT acceptance. We also covered tracking and reporting functionality, system integration, import, and export capability, and help/support functions.

In the end, as always, it's up to you and your client to decide what program will suit their needs, both now and in the future.

Mary Girsch-Bock

Mary began her career as an accountant in the property management industry, later moving into the healthcare industry. She is now a freelance writer specializing in business and technology issues and is the author of her first book, several HR handbooks, training manuals, and other in-house publications. She can be reached at mary.girschbock@cpapracticeadvisor.com.

Wasp Barcode - QuickStore POS Standard Edition

2012 OVERALL RATING ★★★★½

BEST FIT

QuickStore is a scalable product that will work well with retailers of any size. Currently, QuickStore is not recommended for grocery stores or restaurant businesses.

STRENGTHS

- Product is extremely scalable and suitable, with 3 versions available
- Slight learning curve means quicker system setup and use
- Offers a variety of pre-bundled software/hardware combinations suitable for most retailers
- Excellent selection of training demos available
- Solid selection of POS related products available

POTENTIAL LIMITATIONS

- Limited management reporting
- Limited accounting integration available
- Does not offer e-commerce integration

QuickStore from Wasp Barcode Technologies is a POS system that is available in three versions; Standard, Professional, and Enterprise. Wasp Barcode Technologies also offers a variety of POS related products, and their POS products are available bundled with all necessary software, making system setup simple.

SUMMARY & PRICING

QuickStore POS from Wasp Barcode Technologies is available to customers in a conveniently bundled package. Each package includes POS software, a cash drawer, barcode scanner, thermal receipt printer, power supply, magnetic card reader, and 1-year maintenance agreement. The Standard level of QuickStore is available for $999, Professional is available for $1,995, and the Enterprise version will run $2,995. WASP Barcode Technologies also offers a long list of other retail/POS packages, all at varying prices.

★★★★½	BASIC SYSTEM FUNCTIONS
★★★★	SPECIALIZED FEATURES/SERVICES
★★★★	TRACKING/REPORTING
★★★★½	INTEGRATION/IMPORT/EXPORT
★★★★★	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10739894

866-547-9277 **www.waspbarcode.com**

New Sage Exchange Features Offer More POS Options

The need to offer more mobile applications for retailers is becoming more apparent. The act of a customer shopping in a brick and mortar store, then paying for their merchandise at that location is still relevant, but is rapidly being joined by other more flexible options such as Internet sales, area kiosks, telephone sales, and even trade shows and sidewalk sales.

As a result, salespeople are no longer tied to a cash register and are free to do what they were hired to do: sell. This flexibility, along with the need to tie kiosk sales, multiple store locations, or web sales to back office accounting software has posed a problem, particularly for smaller retailers, who have often spent many hours reconciling off-site, Internet, and telephone sales to their existing AR.

That reconciliation just got a lot easier with the latest functionality added to the Sage Exchange payments platform from Sage North America. Sage Exchange is designed to help small to mid-sized businesses (SMBs) manage their entire payments ecosystem from a central location, including connecting payment devices to their accounting software. Sage Exchange offers a direct interface between a variety of devices, including credit/debit card terminals, electronic check terminals, and other point-of-sale (POS) devices. Sage Exchange will also integrate with mobile devices such as phones or tablets.

Sage Exchange works with nearly all Sage Accounting products as well as a variety of third party applications. Sage Exchange is PCI (Payment Card Industry) certified and offers users a safe, secure environment for integrated payment processing by eliminating the need for manual payment processing of each sale. Eliminating tedious data entry also reduces error occurrence.

Sage Exchange also provides retailers with up-to-date, real-time payment processing, while offering users a consolidated view of all payments processed. The introduction of the Sage Exchange portal provides customers with a simple three-step approach to connect payment devices with accounting and ERP software. The interactive Sage Dashboard within the new portal offers users the ability to easily customize the interface to suit their needs. The My Dashboard option, at the top of the screen, provides users with complete customization capability, allowing users to customize tiles to represent frequently used features.

My Connections is where all components that will use Sage Exchange are set up for use; all components need to be registered with Sage Exchange in order to be used. Reporting options are excellent, and managers can run reports using any web browser. All reports are processed in real time.

Accountants helping clients manage various businesses can have one copy of Sage Exchange and view the data on all of them from the portal. Each client can have access to only his business' payments data using roles-based permissions, but the accountant can easily see payments data for all his clients.

www.sageexchange.com

Intuit QuickBooks Point of Sale 2013

2012 OVERALL RATING ★★★★½

BEST FIT

With the revamped point of sale product from QuickBooks, they have succeeded in expanding their market considerably. Making use of Cloud technology along with flexible payment options make this a good product for small to mid-sized retailers with up to 20 locations that do not process a high level of sales transactions.

STRENGTHS

- Easy to install and setup
- The addition of the Go Payment app add flexible payment options
- Good reporting options
- Slight learning curve
- Affordable pricing and good support system

POTENTIAL LIMITATIONS

- Integrated shipping option could be stronger
- Not suited for high volume retailers, but suitable for SMBs with multiple locations or single store high volume payments.
- Users may potentially outgrow

SUMMARY & PRICING

Quick Books POS 2013 was released in June 2012 and is currently available for $999.00. An excellent stand-alone POS product, using QuickBooks POS 2013 in conjunction with QuickBooks financial products ensures a complete front office/back office retail solution.

☆☆☆☆☆	BASIC SYSTEM FUNCTIONS
☆☆☆☆½	SPECIALIZED FEATURES/SERVICES
☆☆☆☆½	TRACKING/REPORTING
☆☆☆☆☆	INTEGRATION/IMPORT/EXPORT
☆☆☆☆☆	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10737420

866-379-6636

intuitpayments.com/POS

CAM Commerce Retail STAR Lite

2012 OVERALL RATING ★★★★★

BEST FIT

Retail Star is best suited for larger retailers that have very specific needs. Retail Star contains excellent customization capability and retail-industry specific applications. For single location retailers, they may wish to try Retail Ice, a comparable version of the software available for use in one location.

STRENGTHS

- Complete front/back office POS/financial management system
- Scalable, with users able to choose only the modules needed
- Direct interface with e-commerce technology
- Complete systems available for specialty stores such as apparel, sporting goods, pet stores
- Solid customization capability

POTENTIAL LIMITATIONS

- Steep learning curve for some
- Cost may be prohibitive

Retail Star, from CAM Commerce is a comprehensive POS product that contains both front and back office financial management capability along with an excellent POS function. Retail Star is a modular system, with users able to customize the system to suit their needs.

SUMMARY & PRICING

Retail Star is a powerful POS system that is ideal for large retailers with multiple locations. Complete back office functionality reduces duplicate data entry and ensures a more accurate, smooth running system. For small, one location retailers, Retail Ice is worth a look. Conveniently, all system data entered into Retail Ice can be easily transferred to Retail Star, if the basic product is outgrown.

☆☆☆☆☆	BASIC SYSTEM FUNCTIONS
☆☆☆☆☆	SPECIALIZED FEATURES/SERVICES
☆☆☆☆☆	TRACKING/REPORTING
☆☆☆☆☆	INTEGRATION/IMPORT/EXPORT
☆☆☆☆☆	HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10741224

800-726-3282

www.camcommerce.com

UTC RETAIL Offers All-Inclusive Solution

Retailers face many challenges, particularly when it comes to finding a point-of-sale system that can meet all of their needs, from the necessary hardware, the software the point-of-sale uses to manage transactions and the services they need to keep running efficiently.

While many vendors offer the hardware or the software, few offer an all-inclusive system, but UTC Retail does. The company develops, markets and services several point-of-sale systems designed for small and mid-sized retailers. The company's software can be used to manage retailers with anywhere from one to 1,000 locations, and its feature set includes specific tools for managing complex merchandise inventories across all locations.

UTC also provides mobile and remote retailing functions, order processing, planning utilities and advanced reporting and analytics, with managerial reporting accessible via mobile devices. The system can be configured to automatically post transactions to virtually all small and mid-sized business management systems, from QuickBooks and Sage, to NetSuite and Microsoft Dynamics. It also offers integration with timeclock utilities and other programs.

Extensive customization options allow businesses to tailor the program to their specific needs and workflow, including setting varying levels of user and managerial access rights and security, customizing data fields and additional areas of the program. It includes advanced retail management tools, including warehousing, distribution, allocation, call center, mail order and catalog sales, and e-commerce.

The hardware solutions offered by UTC include terminals, fixed and portable handheld scanners, credit card processers and servers, with modular designs that allow for simple scalability if a retailer needs to add new stations. UTC provides full U.S.-based support, from initial planning and business analysis, through system configuration, user training and ongoing technical assistance. Pricing is dependent upon the number of point-of-sale stations within a retailer, as well as the number of locations and specific needs such as warehousing and distribution.

www.UTCRetail.com

Celerant Command Retail – Version 6.4

2012 OVERALL RATING ★★★★★

BEST FIT

Small, large, or somewhere in between, retailers will surely appreciate Command Center's long list of product features, all designed to make running a retail establishment a lot easier. That long list of features makes Command Retail particularly well-suited for larger retailers, or those with multiple locations that desire efficiency as well as ease of use.

STRENGTHS

- Front & back office management
- Integrated e-commerce capability
- Comprehensive customer tracking and data mining capability
- Excellent for all types of retailers including high-transactions processing retail businesses
- Solid management reporting and analysis

POTENTIAL LIMITATIONS

- Learning curve could be steep for new users
- Pricing and long list of features probably not suitable for smaller retail businesses

Celerant Command Retail from Celerant Technology Corporation is fully integrated Point of Sale/Retail Management software. Command Retail provides retailers with a complete POS solution and is suitable for retailers of all sizes and types. Modules includes with Command Retail include inventory management, e-commerce functionality, and warehouse management.

SUMMARY & PRICING

Command Retail's complete system generally starts at about $12,000; a significant investment, buy worth the price for large retailers with multiple locations

★★★★★ BASIC SYSTEM FUNCTIONS
★★★★★ SPECIALIZED FEATURES/SERVICES
★★★★★ TRACKING/REPORTING
★★★★★ INTEGRATION/IMPORT/EXPORT
★★★★★ HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10739712

718-605-7733 **www.celerant.com**

ECR Software Corp. Catapult 5.1.1

2012 OVERALL RATING ★★★★½

BEST FIT

Catapult is truly designed for a specific part of the retail industry, and with touch screen technology standard on all of its systems, it truly works with high-volume specialty retailers of any size.

STRENGTHS

- Touch screen monitor is standard
- Product contains unlimited customization capability
- Little training necessary for new users
- Offers a long list of industry specific POS solutions
- Affordable, even for smaller businesses

POTENTIAL LIMITATIONS

- Limited e-commerce interface
- Not suitable for mail order/web-based businesses
- No integrated shipping options currently available.

Catapult POS Software from ECRS Retail Automation Solutions is a completely customizable POS software product specifically designed for specialized retail industries such as convenience stores and gas stations, pharmacies, grocery stores, and health system industries including gift shops and kiosks.

SUMMARY & PRICING

Currently, Catapult starts at $1500 for a single-user system, with additional add-ons extra. Designed for specific vertical markets, Catapult provides high-volume retailers with unlimited customization capabilities as well as an easily navigated product that requires little training time.

★★★★★ BASIC SYSTEM FUNCTIONS
★★★★★ SPECIALIZED FEATURES/SERVICES
★★★★★ TRACKING/REPORTING
★★★★½ INTEGRATION/IMPORT/EXPORT
★★★★★ HELP/SUPPORT

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10739710

800-211-1172 **www.ecrs.com**

Your Team Is An Idea Generation Machine

Wildly Important Goals (WIGs) as defined by Franklin Covey methodology, are the goals that an individual or team develops that simply must be accomplished or everything else does not really matter. They are the goals that will help your firm climb to the next level of success, so identifying the WIG's that will create an environment that is better, faster, cheaper and easier is the key to true positive change.

The key to identifying these WIG's is for the leaders in the firm to get out of the way and allow your team to identify and develop these initiatives. For years, firm leaders have shared their frustration in this endeavor. The frustration often is communicated in a short sentence, "I ask everyone to share their ideas but I get NO response, so I have to do this myself". That statement tells me that their heart is in the right place, but their process is broken.

In this article, we will concentrate on the "how" of getting your team to share their ideas to make the initiatives in the firm better, faster, cheaper and easier. The goal – make your team fearless about suggesting new and innovative ideas without fear that they will be laughed at or ignored.

Set the Proper Tone

Set the proper tone means creating an environment that embraces open discussion about new ways of implementing both current and futuristic initiatives. This tone starts at the top level of the organization. When you think about your firm leaders, are they excited to communicate with all levels of the team and engage in open and honest feedback about what is working and what is not working? Are all levels of the firm asked for their opinion when determining strategies for the strategic plan or are only the owners and sometimes managers being given time on the agenda?

Think deeply about what your leadership tone is saying about your openness to new ideas, as this is the most common deterrent to really tremendous ideas from your team. Your new mantra should be *"new and different ideas are welcome and expected from everyone in the firm"*. If you are not sure what your tone is, ask your employees by initiating an upward feedback survey and ask questions around communication, openness, trust and leadership. You may find that while your leaders hearts are in the right place, your actual tone that is being perceived by the team is quite different, and when it comes to gathering ideas from people, perception is reality.

Communication is Key

As you read the word communication, your eyes may have already rolled and your mind is already buzzing with "good grief we have meetings by the minute and a conversation every day, communication is NOT a problem for us". This may be true, but those meetings only mean that you are talking about current daily initiatives, not about new ideas that will take the firm to the next level. Many firms believe that by placing a suggestion box in the break room and then telling their team to fill out the form and you will review it will make new ideas just flow through the system. Trust me when I say that most firms that try this approach get more cobwebs out of the box than actual suggestions. The process that you set up and the actual excitement in the message needs to happen 1) when you announce the initiative, 2) when you have ideas flowing and 3) when an idea is actually implemented. Communication is not just about great ideas – it is about the number of ideas produced. Good ideas produce spectacular ideas, so the more that are flowing, the better the ideas get.

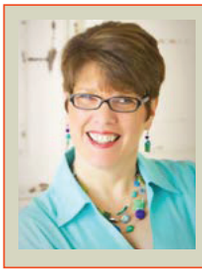
Reward and Recognize the Individual

When you see the word reward – the implication is "cash". Let's face it, cash is certainly one motivator but it is not the only motivator. As you build out the firm's processes for idea generation remember that reward and recognition are important to overall adoption and motivation. Consider a tiered approach:

- *Level 1: Submit an idea* – receive a certificate, recognition at a staff meeting, or employee's name on the firm's electronic bulletin board.
- *Level 2: Idea is chosen for consideration* - cash award, traveling trophy, or a gift certificate.
- *Level 3: Idea turns into a firm project for implementation* - an additional day off or a larger cash bonus.

The most important part of the program is creating excitement, fun and ultimately tremendous ideas that will make the firm better. Leaders of the firm will be pleased with the results if they encourage the team to speak up and be a part of the ongoing growth and development of the firm through idea generation.

Your team might not come up with anything off the charts in the first few months, but remember that the more ideas that you can start moving through the process the more likely you will be to find one or two that are truly revolutionary!



Sandra Wiley

Sandra Wiley is COO & Shareholder of Boomer Consulting and has been lauded for her prominent role as an industry expert on HR and training as well as influence as a management and planning consultant.

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2012 TECHNOLOGY UPDATE

TECHNOLOGI

Technology tools enable us to serve our clients better, work fewer hours to accomplish the same task, net more revenue to our firm and shareholders, and help with world peace. OK, maybe not that last part, but pretty much everything else can be accomplished if technology is managed right. In most columns, a single focus is chosen, but for this article, we are going to surf the technology to watch or that is coming soon. 2012 is a notable hardware year, setting us up for software gains in the coming years.

Low level changes

The following items will not have an immediate impact on your use of technology, but taken together, will make for notable changes in the speed and usability of hardware produced by all vendors. The fundamental building blocks of hardware are taken together to construct a whole solution.

Randy Johnston

Mr. Johnston is executive vice president and partner of K2 Enterprises and Network Management Group, Inc.
He is a nationally recognized educator, consultant and writer with over 30 years' experience. He can be contacted at randy.johnston@cpapracticeadvisor.com.

ITEMS TO WATCH INCLUDE:

- **UNIFIED EXTENSIBLE FIRMWARE INTERFACE (UEFI)** — The Basic Input Output System (BIOS) specification has been with us for more than three decades. Windows 8 will see BIOS, as we know it, go away and the emergence of UEFI. UEFI is essentially the next generation of BIOS. It's a system that potentially offers new and more advanced control of the boot-up process. If your PC is less than two or three years old, chances are that it already has UEFI capabilities. Chances are very good that you didn't know that, because the hardware manufacturers have been carefully keeping the old BIOS interface as your default boot system. The **Unified Extensible Firmware Interface (UEFI)** is a specification that defines a software interface between an operating system and platform firmware. UEFI is a more secure replacement for the older BIOS firmware interface, present in all IBM PC-compatible personal computers , which is vulnerable to bootkit malware.

The original **EFI (Extensible Firmware Interface)** specification was developed by Intel. In 2005, development of the EFI specification ceased in favor of UEFI, which had evolved from EFI 1.10. The UEFI specification is being developed by the

ES TO WATCH

industry-wide organization Unified EFI Forum. UEFI is not restricted to any specific processor architecture and can run on top of, or instead of, older BIOS implementations. But that will change with Windows 8 when UEFI becomes the default boot system.

- **INTEL'S IVY BRIDGE TECHNOLOGY** — the third generation of iCore Generation of Hardware has been released. **Ivy Bridge** is the codename for Intel 's 22 nm die shrink of the Sandy Bridge microarchitecture based on tri-gate ("3D") transistors. Ivy Bridge processors will be backwards-compatible with the Sandy Bridge platform, but might require a firmware update (vendor specific). Intel will release new 7-series **Panther Point** chipsets with integrated USB 3.0 to complement Ivy Bridge. In February 2012, it was reported that Intel would postpone the launch of the dual-core mobile CPUs (not desktop CPUs or quad-core mobile CPUs) to June 2012 to allow more time to sell surplus inventory of Sandy Bridge CPUs, which accumulated due to slower than expected computer sales. This in fact has now happened.

- **PROCESSORS FROM OTHER COMPANIES LIKE ARM OR MARVEL** will appear in more phones, tablets and specialized products. These processors require less power, but can provide ample horsepower to run applications for mobile use.

- **THUNDERBOLT** — Thunderbolt is a standard type of connection that might be used by any number of different kinds of devices. Generally, it refers to the types of cables, ports, and connectors used to connect Thunderbolt devices to computers. Thunderbolt is considered a potential replacement for USB, FireWire, PCIe, SCSI, SATA, and other forms of data transfer methods. Considering the potential applications of Thunderbolt, it could eventually reduce the types of connections available in computer devices. Thunderbolt supports a data rate of 10 Gbit/s in both directions. Visit www.thunderbolttechnology.net.

- **BLUETOOTH 4.0** — Bluetooth low energy (BLE) is a feature of Bluetooth 4.0 wireless radio technology, aimed at new, principally low-power and low-latency, applications for wireless devices within a short range of up to 50 meters or 160 feet. This facilitates a wide range of applications and smaller form factor devices in the healthcare, fitness, security and home entertainment industries.

- **SOLID STATE DRIVES (SSD)** — SSD and Hybrid Hard Drives (HHD) drives have performance benefits over Hard Disk Drives (HDD), such as boot time and response, but the quality varies as does the life span of the drive depending on the type of work you do. With boot times of under 21 seconds and fast I/O, SSD will pay for itself. One estimate puts the life expectancy of SSDs at 50 years, another at less than four. No one really knows for sure… yet, so you should still back up frequently. Expect SSDs to last for several years. Since there are unexplained failures, though, test your SSDs with the free utility http://ssd-life.com.

- **GORILLA GLASS** — This Corning product promises to give us more durable tablet and phone screens. Less prone to breakage, and more sensitive to touch.

- **MULTI-TOUCH MOUSE PADS** are just one of the new ways to navigate (Mouse and Keyboard vs. Touch and Motion). When you reflect on touch in phones, tablets and other products like the Microsoft Surface 2 or on motion used in capture, gaming or gestures, we can't help but reflect on the change in using technology over the last three years or so.

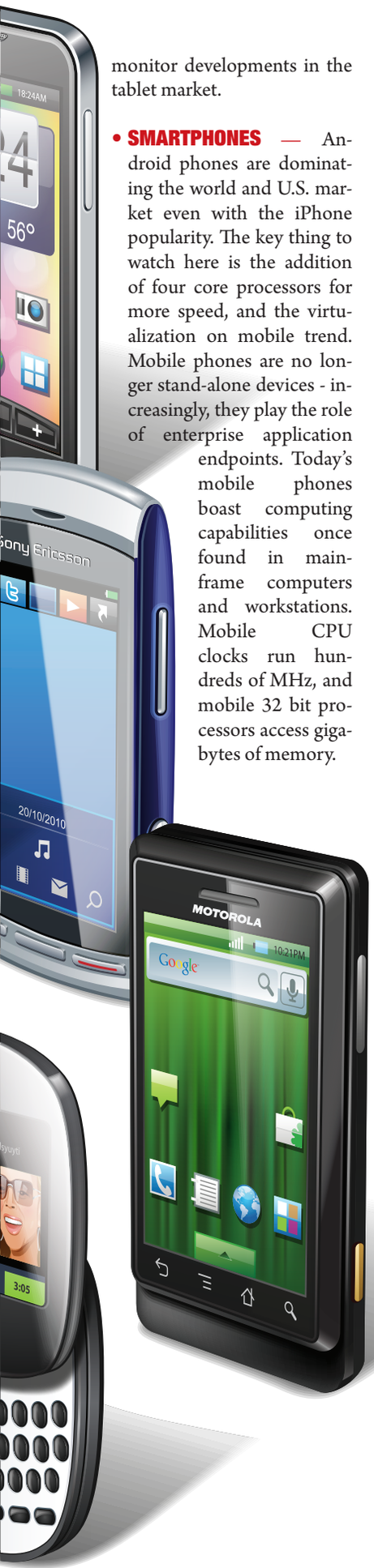
From Kinect for Windows to gestures and the art of being Tapable, we will all be doing more Pinch, Rotate, Two Hand Pinch, and Spread. (I'm reflecting that my Grandma wouldn't be happy to see that last sentence in print!). See http://en.wikipedia.org/wiki/Multi-touch_gestures for more gestures.

- **3D PRINTING OR SOLID MATERIALS PRINTERS** — 3D printing is a phrase used to describe the process of creating three dimensional objects from digital file using a materials printer, in a manner similar to printing images on paper. "Physibles" are the files that drive Additive Manufacturing or the ability to print 3D solids. Though the group who made the physible file format popular had its share of troubles – its four founders were recently sentenced to fines and jail time due to copyright infringement – The Pirate Bay continuously manages to reinvent itself. The Pirate Bay service recently tickled our imagination by announcing a new category of files, which let you "download" physical objects or physibles; more accurately, files meant for 3D printers. Can you imagine? Consider the ability to scan a person's mouth, send the 3D image to a third party and have the dentures cut from a 3D printer and have the denture mold printed from a 3D printer. Or how about taking an MRI image of a knee joint and printing a new knee. Recently a heart value was printed on a 3D printer. We are just entering the third wave of manufacturing.

Some of these technologies are already being used in new computers and supporting hardware, including:

- **ULTRABOOKS** — An Ultrabook is a higher-end type of subnotebook defined by Intel. Intel invented (and trademarked) the term "Ultrabook". Ultrabooks are designed to feature reduced size and weight and long battery life while retaining strong performance. Any thin-design laptop that uses Intel's processors and adheres to certain specs is an Ultrabook. The thickness must be no more than 0.71 inches (18 millimeters) at its thickest point. The weight must be less than 3.1 pounds. It must have a long battery life, offering more than five hours of general use. It must have flash-based drive for storage. It must use Intel's Rapid start technology for fast boot times. They use low-power Intel CULV processors with integrated graphics, solid-state drives for fast loading times, and unibody chassis to fit larger batteries into smaller cases. Because of their minimal size, the ability to have many ports (USB, HDMI, VGA, Ethernet, etc.) is limited. Ideally, Ultrabooks should also have a "mainstream" price in the neighborhood of $1,000.

- **TABLETS** — from the new iPad to the Galaxy Tab 2 to the Kindle Fire, we are seeing more tablets used for personal pleasure. Additionally, they are being configured for business use. So much has been written about tablets, I'm not sure what practical guidance can be added in this overview of technology, except that Microsoft's new Surface tablet that runs Microsoft Office natively could be an interesting add to this mix. We also need to



monitor developments in the tablet market.

- **SMARTPHONES** — Android phones are dominating the world and U.S. market even with the iPhone popularity. The key thing to watch here is the addition of four core processors for more speed, and the virtualization on mobile trend. Mobile phones are no longer stand-alone devices - increasingly, they play the role of enterprise application endpoints. Today's mobile phones boast computing capabilities once found in mainframe computers and workstations. Mobile CPU clocks run hundreds of MHz, and mobile 32 bit processors access gigabytes of memory.

Software is changing, too

As we have covered in a previous column, the software platforms continue to evolve, but we also see convergence from computer to tablet to phone in all of the major players.

PLATFORMS TO WATCH INCLUDE:

- **IOS 6** — This Apple iPhone and iPad operating system is due in the fall. We can expect Apple's new desktop OS, Mountain Lion, to have features that emphasize convergence with iOS 6.

- **ANDROID 4.0** (Ice Cream Sandwich), the current Android operating system is roughly comparable to iOS 3 in functionality. Android developers got into a habit of codenaming new versions for desserts. With such a "sweet" habit, they are expected to stay with it. They started with 1.5 Cupcake, 1.6 Donut, 2.0 éclair, 2.2 Froyo, 2.3 Gingerbread, 3.0 Honeycomb (active today), **4.0 Ice Cream Sandwich (current version)**, and rumor of good things to come, 5.0 Jelly Bean (expected to be released late 2012), and 6.0 Key Lime Pie (after Jelly Bean is fully deployed).

- **WINDOWS 8** — Microsoft will be supporting and in its next version of the Windows operating system. So in the history of Windows, what's next? There are still lots of speculation and rumors, and there is a lot of pressure from manufacturers to "get it out." The Office 15 Release could be holding up Windows 8. We expect two versions of Windows plus the new tablet Surface version or RT. First, we'll have the traditional Intel/AMD OS that supports the three traditional form factors related to "lap PCs" and tablets, workhorse PCs, and family hub PCs. The lap PC will have tablet features, the workhorse PC is the traditional desktop or laptop system, and the Second, we'll have the ARM version for tablets and smart devices that will not run traditional code. Windows 8 Metro features include:
  - Support for both x86 PCs and ARM devices
  - Gestures, Touch-centric, Tiles-based User Interface (UI)
  - Charms
  - Snap Multi-tasking
  - Windows 8 Control Panel
  - Web Navigation by Touch
  - Two Touch Keyboards
  - Enhanced Copy Experience
  - Native USB 3.0 Support
  - Better Support for Multiple Monitors

These platforms will be supported by HTML 5 software and virtualization. Developers will innovate broadly as soon as these platforms are stable.

Things to Come

Over the coming months, hardware built on the technologies above will arrive. Software vendors will begin to take advantage of the new capabilities. Software to watch in the near term:

- **OFFICE 15** — We'll write much about this over the next few months as more facts become known.

- **HADOOP** — This is software to process "Big Data". **Big Data** consists of data sets that grow so large that they become awkward to work with using on-hand database management tools. Data demands today include non-traditional data types beyond words, such as images, audio, and other non-structured data types. Difficulties include capture, storage, search, sharing, analytics, and visualizing. This trend continues because of the benefits of working with larger and larger data sets allowing analysts to "spot business trends, prevent diseases, combat crime." Big Data is the next frontier for innovation, competition, and productivity. McKinsey Global Institute studied big data in five domains—healthcare in the United States, the public sector in Europe, retail in the United States, and manufacturing and personal-location data globally. Big Data can generate value in each of these five domains. For example, a retailer using big data to the fullest could increase its operating margin by more than 60%. Google or Bing on Big Data to learn more. So, what is Hadoop? Hadoop is an open-source project administered by the Apache Software Foundation. Hadoop's contributors work for some of the world's biggest technology companies. That diverse, motivated community has produced a genuinely innovative platform for consolidating, combining, and understanding large-scale data in order to better comprehend the data deluge. Hadoop is set to be the next big database type, Hadoop File System or HDFS. And yes, companies like CCH are already looking at Big Data.

This short look at our evolving technology future will set the stage for our on-going recommendations of practical selections of the right computer technology to deploy. We'll continue to evaluate Cloud, on-premise and Hybrid strategies to serve client's needs best. No hardware or software stone will be left unturned IF we believe it can help you serve clients better and give you a competitive advantage. ●

What Tax Outsourcing Looks Like Today

Over the last decade, accounting firms ranging in size from small local firms to large international ones have embraced tax outsourcing as a way to improve efficiency, client service, and staff retention. This article will provide an overview of those benefits as well as discuss the workflow, security, and regulatory issues surrounding the business process.

Tax outsourcing improves efficiency in at least three ways. First, it increases the annual billable hours per tax professional by enabling firms to staff for off-season rather than peak-season workload. Second, tax outsourcing moves firms toward a paperless tax workflow which streamlines and standardizes the preparation and review process. Third, when offshore tax outsourcing is used, firms can significantly reduce costs due to the wage differential between U.S. and offshore preparers.

Tax outsourcing improves client service in at least two ways. First, with most tax outsourcing vendors providing a one to three day turn-around time, firms can get tax returns back to their clients days if not weeks earlier. Second, by eliminating mundane data entry and file organization tasks outsourcing enables tax professionals to focus on higher level, value-added client services.

Finally, firms say that tax outsourcing improves their ability to attract and retain qualified staff by "taking the

TAX OUTSOURCING ENABLES FIRMS TO GET THE WORK DONE WHILE PROVIDING STAFF SOME SEMBLANCE OF A NORMAL LIFE DURING TAX SEASON.

edge" off tax season. Long busy season hours drive many people out of the profession. Tax outsourcing enables firms to get the work done while providing staff some semblance of a normal life during tax season.

Tax outsourcing is enabled by paperless workflow technology that connects a CPA firm with its tax outsourcing service provider. When taxpayer source documents are received, the CPA firm scans and uploads them to the tax outsourcer's website along with a copy of the proforma tax software file. The tax outsourcer then preparers the tax return along with an organized, indexed, and annotated set of digital workpapers that make review more efficient.

If corrections are needed, CPA firms can either have the outsourcer make them or do it themselves if the work required is small.

Along with quality, the top concern of most CPA firms that outsource is maintaining the security and privacy of taxpayer information. Firms must adequately vet their service providers to ensure data security is maintained. To do this, firms should consider the security of the location where the work is performed (the service center), the security of the hardware where the data resides (the data center), the security of the software used to provide the service, and the security of the data while in transit.

SurePrep's onshore and offshore service centers, for example, are designed to prevent its tax preparers from removing taxpayer data from the facility. To start with, no hardware in the service center contains taxpayer data. SurePrep preparers work from virtual machines located in world class data centers. So theft of hardware from the service center would not cause a breach of taxpayer data security. Furthermore, SurePrep preparers do not have the ability to send taxpayer data out of the service center via email or the internet.

Because SurePrep maintains a paperless environment there's no ability to print or write taxpayer data on paper that could be removed from the premises. SurePrep preparers are prohibited from using cell phones at their workstations so that data cannot be removed verbally, by texting, or digital photography. And closed circuit cameras record all work areas to ensure compliance with these security procedures.

Most people that visit their tax outsourcer's service center comment that the security is beyond that of any CPA firm. In addition to preventing the unauthorized removal of data from the service center, the servers where the data resides need to be physically secure from theft or intrusion. To achieve this, tax outsourcers should maintain servers at data centers with SAS70 Type 2 and SSAE-16 certifications.

Even if the servers are physically secure, firms need to have confidence that outsourcers' servers cannot be hacked into over the internet. To provide this level of assurance, SurePrep hires a company to try to hack into its systems every year. Vulnerabilities found are remediated after which the security consultant provides its unqualified opinion as to the security of the software. Finally, data must be safe while in motion. This can be achieved by ensuring all data transfers between the CPA firm and outsourcing provider are done over an encrypted connection.

MOST PEOPLE THAT VISIT THEIR TAX OUTSOURCER'S SERVICE CENTER COMMENT THAT THE SECURITY IS BEYOND THAT OF ANY CPA FIRM.

Tax outsourcing services can be performed onshore or offshore. Using offshore resources reduces costs but requires the CPA firm to obtain a signed and dated Section 7216 consent letter from the taxpayer before tax return information is disclosed to an offshore tax preparer.

Section 7216 consent letters must include the name of the taxpayer, the name of the tax return preparer, the name of the recipient, the intended purpose of the disclosure, and the specific tax return information to be disclosed. The letter may specify the duration of the consent (e.g., 10 years) eliminating the need to get it signed every year. Every firm we know that has requested 7216 consents from their clients has received them without issue enabling them to enjoy cost advantages over most other firms.

Summer is a great time to test tax outsourcing and see if the process can benefit your firm. In addition to the above considerations, firms will want to ensure the tax outsourcer has the experience necessary to prepare high quality returns, and has technology that can add value beyond the tax outsourcing service. SurePrep, for example, streamlines the onscreen preparation and review of tax returns with its SPbinder paperless tax binder.

SPbinder is a workpaper system that integrates PDF, Excel, Word and e-mail documents into a single electronic tax binder. SPbinder provides a common set of tools that allow workpapers of every format to be cross-referenced, tickmarked, annotated, and signed off. SPbinder tracks open items, review notes, and automatically determines missing documents. And SPbinder enables each worksheet or page in a file to be organized separately, providing the same organizational flexibility as with paper (something that can't be done with any other document management or workpaper system). Each tax outsourcer provides its own flavor of value-added technology. It is up to firms to decide which will provide the most benefit.

By Dave Wyle, CPA

David Wyle is the President and CEO of SurePrep, a leading provider of tax productivity solutions to U.S. public accounting firms. Prior to founding SurePrep, Mr. Wyle founded and was CEO of ePace! Software, creator of the industry leading paperless engagement.

Technology Versus Dirty Power

Digital devices have always had a love-hate relationship with the power needed to operate them. In addition to low battery life and power failures, there is the insidious "power spike" that seemingly can be caused by anything from a passing storm to a cat rubbing up against your leg. A tiny whisp of white smoke you don't even see, and the device is gone forever.

And then there is the whole issue of "Dirty Power."

The power in your house or office is delivered by the power company to your electrical outlets at a standard 125-volts. Plus or minus, that is, ten percent. So the actual power delivered to a device could be as little as 112.5 volts, or as much as 137.5 volts. Which may be all fine and good for a hair dryer, but plays with your computers and printers. That is one of the reasons that very sensitive devices like laptops and tablets run off of DC rather than AC power, so that the battery acts as a kind of power filter. Kind of. Not bullet-proof.

Dave McClure

Mr. McClure is a consultant and widely published writer on technology issues. He can be contacted at dave.mcclure@cpapracticeadvisor.com

Still, most computing equipment today comes with a power supply that is built to handle the every-day problems of dirty power and routine fluctuations from low to high. What they are not equipped to handle is the random lightning strike on the power pole outside your house, or when your ancient refrigerator in the kitchen and the old freezer in the garage decide to kick on their compressors at the same instant.

And it isn't just your computer that you have to worry about any more. Those big-screen television sets with the fancy high-def cables that are gold plated for a perfect signal? Even a power surge that does nothing else can take out the HDMI circuits, leaving you with a problem that costs more to fix than the TV did in the first place. Cell-phones? These are sometimes known as "fry-babies." USB devices like printers? The printer is fine…but the USB port is fried.

So how do you provide protection for a small office or home? The question is more complicated than you might expect.

- **Forget power strips.** This is the worst form of false confidence, even with the big units costing a hundred dollars or more. They simply don't work. Or if they do, they work only for a small number

of power spikes. Often, these have failed within days of being installed, but give no indication they are no longer providing protection.

- **Whole-house or whole-building power protection is expensive.** If you are able to build it into the electrical system, that's fine. Retrofitting it into your home or small office is likely not feasible, particularly given the cost of maintenance and upkeep.
- **The best solution is the hard one.** This involves a zone-defense strategy, covered by Uninterruptible Power Supply units with maintenance twice a year.

The third option works this way: Whether in the home or in the small office, cluster electronic devices into a minimal number of hubs. For the home, this would mean one hub for entertainment in the living area and another for computers in the home office. You can also protect outlying computers in kids rooms, but these are less difficult to replace as long as you have a backup schedule in place.

For each "electronics hub," purchase a UPS unit that also filters the power. Now here is the tricky part – you must replace the UPS, or at least the battery, at least two times per year. This will cost you, with shipping, about $125 per year per hub. But the alternative is to lose one or more devices, with a replacement cost that is likely just under the deductible on your replacement insurance policy.

Actually, you may find, if you watch the sales, that it is cheaper just to replace the whole unit than to replace the battery. Also, note that you must properly dispose of the battery or the unit – you can't just take it to the dump.

The love-hate relationship between our devices and our power supply continue, exacerbated by a new generation of cheap-parts electronics that are not built to withstand even common power surges and spikes. That's not going to change anytime soon, putting accountants at risk for the loss of thousands of dollars in electronics – and potentially, client data as well – at any time.

REALITY CHECK

A compendium of ideas, products, rants and raves from the viewpoint of the author. Not that the author has no financial interests in any of the products mentioned. Feel free to disagree, or to share your ideas by sending them to Dave.Mcclure@CPAPracticeAdvisor.com.

INTERNET SITE OF THE MONTH:

APC Uninterruptible Power Supplies (www.APC.com). Arguably the top manufacturer of UPS systems for small offices and homes, APC provides a range of options and information to help accountants make selections for their electronics hubs.

Samsung's Galaxy S3 cell phone. Newly available from all of the cellular companies for about $200, this world-class Android phone is fast, has global roaming capabilities on GSM and LTE networks, and a host of advanced features. The S3 is no iPhone, but it may be the best cell phone for those who don't want to be locked into the Apple empire.

Internet streaming services. I briefly subscribed to the Netflix streaming service for TV shows and movies, but rapidly grew bored with the lack of interesting content. Never knew there were so many vapid zombie movies. Ditto the twenty or so competitors being fired up by just about everyone who thinks they can dominate this market. Two notes for these companies: I ride the airplanes and the trains and I sit in the coffee shops, and almost no one is watching TV on their smart phones. And if they were, it is something they recorded for free, not something they are willing to shell out big bucks for.

Microsoft's "Surface" tablets. Microsoft has jumped into the tablet market with not one but two different models under the "Surface" brand, both based on the new Windows 8 operating system. But are they serious about this market, given their poor performance in previous hardware ventures? Most likely not. A better strategy is to use the smart, sleek units to push their vendors into taking Windows 8 more seriously for their own tablets. Only time will tell.

The deadline on July 9. As this issue goes to press, the world waits to see how many of the 300,000 Internet users (and maybe four times that many!) who are infected by the DNSChanger virus will see their machines stop working. If they do fall prey to the virus, it will be because they ignored months of warnings from security companies and the FBI. It's a hard road for those who ignore their basic PC security.

Windows Office 2013. Everyone is focused on the new Windows 8 operating system and its "Metro" interface, but the real winner this fall is more likely to be the newest version of the de-facto standard for office productivity. The beta version is out, and while the feature set may still change it offers a tantalizing look at things that may be. A weather forecast app in the calendar? Tres cool!

Integrating Ecommerce and Shopping Carts with QuickBooks... *How Hard Could it Be?*

Is it too much for me to ask for a well-integrated shopping cart for our QuickBooks clients?

I'm on a mission to find a well-integrated shopping cart solution for our QuickBooks clients. In The Sleeter Group's blog (www.sleeter.com/blog/2012/01), Jim Savage, our ecommerce expert, recently posted about "Ecommerce, Shopping Carts and QuickBooks." In that post, he discusses several shopping cart solutions and he gave great tips on how to choose a shopping cart. Check out the article if you want to look through the available solutions in the market.

But as you search for the best solution, consider the big picture of how your ecommerce store needs to integrate into your entire business operation. In my opinion, a shopping cart is pretty useless – no matter how good it is with building web pages – if it fails to provide a completely streamlined way of bringing customer orders into the business operation. This includes integration with inventory, pick/pack/ship, sales tax reporting, and of course accounting. Many of the solutions out there come close on some of these integrations, but let's look closely at the things I have yet to find solutions for.

Note that while some shopping carts have direct QuickBooks integration, others use some type of "middleware" solution to download orders and populate them into QuickBooks or other back-end systems. Each of these two approaches has trade-offs, but our goal is to find a web shopping cart application that can connect directly (in real time) to the back end, whether that's QuickBooks desktop, or any other desktop or online accounting product. At The Sleeter Group, we have very specific criteria for evaluating integration features in shopping carts. While the criteria we discuss here are focused on QuickBooks, keep these criteria in mind no matter which back end accounting system you're trying to connect to. Here are the things we look for:

What connection method does the solution use to **sync data with QuickBooks**? There are many software packages out there that claim to integrate with QuickBooks, but their "integration" methodology is via the IIF file import. Any solution that uses IIF will disqualify it from receiving our recommendations. See Charlie Russell's Practical QuickBooks blog article for more details about IIF. Does it use the QuickBooks SDK (Software Development Kit) or the Intuit Web Connector? The Web Connector has been plagued with issues and is not widely supported by Intuit. Does it use the IPP platform, and therefore the sync manager to sync data with QuickBooks? Although the IPP platform has had struggles to provide developer with the functions they need, it is finally getting to the point where all developers should be using IPP and Intuit Anywhere to connect to QuickBooks desktop or QuickBooks Online.

Does it enter sales receipts and/or invoices or sales orders? Can you specify which transaction types are entered for certain transactions? For example, if the web store allows for a payment type of "Purchase Order," will it create an Invoice? Similarly, if the order is a completed sale (paid by credit card or PayPal), can you specify that it should enter a Sales Receipt in QuickBooks? Does it handle credit memos and refunds or order cancellations? How does it handle payments? Will it import merchant transactions and coordinate the batching of daily sales with Intuit Merchant Services or authorize.net?

What about sales tax? This is the most difficult part of integrating with QuickBooks for developers, and none so far has gotten it right. There are two parts to sales tax. The first part is charging the correct tax on each sale in the shopping cart. The second part is providing full sales tax tracking such that sales tax reports and sales tax returns can be created. Although we often recommend solutions such as Avalara, which provides both parts of the sales tax functions, there will be many clients who don't need or won't afford the extra costs of Avalara's AvaTax service. So in order to provide full integration in the sales tax area, the shopping cart needs to provide full sales tax data in QuickBooks. This means the solution needs to send correct sales tax items (tax rates) and codes (taxable status of customers and items) into QuickBooks to provide accurate sales tax liability

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balances and sales tax reporting required by the accountant who prepares the sales tax returns. And because of constraints in the QuickBooks APIs, the only way to send correct sales tax information to QuickBooks is by populating sales tax items on line items in the body of the sales receipt/invoice. If the integration lets QuickBooks calculate the sales tax at the bottom of the sales form, you'll run into round-off errors, and problems with bank reconciliations. Another big consideration is to consider how the integration assigns sales tax codes and items to a new customer who purchases on the store. As you can see, these are hard problems, and require lots of work for developers to get it right. 90% right just doesn't cut it.

Can it handle sub items? Are the items in the shopping cart able to be mapped to a QuickBooks sub item? How does it deal with product variants (i.e. size, color)?

Does it add new customers to QuickBooks? If so, how does it format the customer name? Can it be customized in how it creates the new customer record? For example, can I ask it to create a new customer with the customer name formatted with "Last, First, Company", or "email, Zip, City", or whatever I want? Does it handle orders from "Jobs" or just "Customers"? How does it avoid creating duplicate Customer records? Does it allow me to specify the fields it should use to match a new customer in the store with an existing customer in QuickBooks so it doesn't add duplicate customers? Does it have a way to merge customer records? How flexible is the customer maintenance section of the shopping cart? Ideally, it should have something similar to Add/Edit Multiple List entries, similar to how QuickBooks Accountant Edition does.

Does the product connect in real time, or does it post transactions on a schedule? Can you change the update frequency? How reliable is the Sync engine it uses to communicate between the shopping cart database and QuickBooks, or other back end systems?

How does it deal with transaction handling? Does it keep a transaction log of the data sync? Can it work if QuickBooks is in multiuser mode? How does it deal with errors in data (products that don't exist in QB, invalid sales tax codes, etc.)? Can you re-run transactions once data issues have been corrected?

Does the shopping cart have a **read/write API for developers** who want to create custom applications to pull and push data including customer lists, sales transactions, back order status, shipping information, package tracking information, etc.? This might be important for clients who have an outsourced shipping department who does the pick/pack/ship process, and then needs to send shipper tracking codes back to the shopping cart so customers can view their order history, including shipment tracking.

Jim Savage and I have not yet seen an integration that gets this right. We would love to be proven wrong, but after researching many products, and trading notes among other Sleeter Group associates, we have yet to find a system that we feel fully integrates QuickBooks and satisfies our criteria. But we sure will tell the world when we find a product that gets this right, so stay tuned.

Shopping carts are something you don't want to switch very often, so it will pay you big dividends if you think through the whole integration issue before you start. I hope these criteria will help you as you go about picking the best solution for your clients.

Mobile Strategies: **App, Mobile Website, or Both?**

One of the major changes taking place in the mobile publishing arena is a move away from having true dedicated "apps" to accomplish tasks on the go. Although a dedicated app is attractive to many users, some corporations and users would like to add capabilities to devices without having to maintain versions which are compatible with every device and operating system version. Many publishers are replacing apps in web stores with apps which are really just a link or placeholder to provide quick, secure access to a mobile website.

All three apps we're covering this month have a traditional SmartPhone or tablet "app" as well as a robust mobile website. While the capabilities of the mobile web versions of the products are usually less robust than the traditional "apps", the mobile portals allow the publishers to extend support beyond the two or three dominant mobile operating systems and support platforms such as Windows Mobile, Symbian, BlackBerry, and HP WebOS without incurring significant additional development charges.

Brian Tankersley, CPA.CITP, Technology Editor

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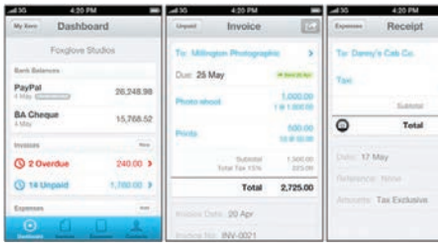
Xero Touch

We've been very impressed with Xero, a web-based small business management application which we first reviewed in the May 2012 issue (www.cpapracticeadvisor.com/10688238). Xero Touch is the name given to the mobile version of this application, which is currently available only for devices running Apple's iOS operating system. Much of the functionality of the full, web-based application is captured in the company's mobile portal (m.xero.com, compatible with all devices), which allows Xero subscribers to list bank transactions, send invoices to customers, and prepare expense reports from almost any mobile device.

The iOS Xero Touch app provides all of these functions, and also provides some additional features such as integration between contacts, image capture of receipts, and simplified login to Xero using a PIN instead of a full username and password. The application also integrates with a wide range of partner services such as FreshBooks, 37 Signals Highrise, Salesforce, PayPal, and many others.

The company has indicated that they would like to have an Android app, but has been dissatisfied with the performance of the app on other platforms. Although this is disappointing, we hope that Xero will revisit this delay in the near future and continue building out key functionality in the mobile version of its offerings.

The iOS version of Xero Touch requires an active Xero subscription, and is free from the iTunes App Store.



Amazon Kindle App

The Amazon Kindle e-reader was a groundbreaking device, and millions of users purchased books and magazines in electronic formats which are covered by Amazon's digital rights management. The copy protection on purchased Kindle e-books initially required that users access the data using either a Kindle device or on a personal computer. Since many of the older Kindle devices now show signs of age such as reduced battery life and damage to the device, many users are now replacing these hardware devices with tablet computers. This transition can cause avid readers to lose mobile access to hundreds or even thousands of dollars of purchased digital content if they do not purchase a replacement electronic book reader device.

Amazon has made it simple for users to consume Amazon's e-books on mobile devices by creating an e-reader for all significant mobile operating systems (iOS, BlackBerry, Android, HP WebOS and Windows), a browser-based cloud reader app, and applications for both the Windows and MacOS computer operating systems. The apps allow users to use their content, and permit downloading, searching, and reading Amazon e-books, e-magazines, and other subscriptions on almost any device, with notes, bookmarks, and reading progress shared among all of the devices on your account. The number of devices where content can be downloaded and accessed varies based on the type of content. Magazines, newspapers, and blogs are generally limited to a single device, while books can generally be installed on more than one device without having to pay for a second license for the content.

Amazon's Kindle app is available through major app stores for free, and more information is available by clicking on "Free Reading Apps" at www.amazon.com/kindle. Although the app itself, as well as some Kindle books are free, licenses for most titles must be purchased separately from Amazon.

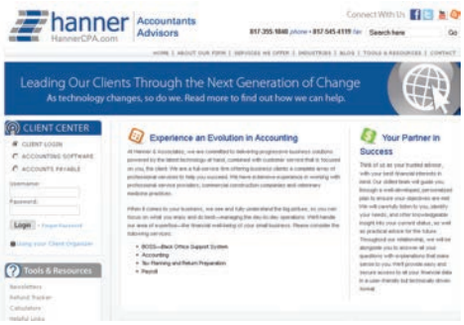
ShareFile Mobile

ShareFile (www.ShareFile.com) is a popular secure file transfer service used by many accounting professionals to transfer files to and from parties outside the organization. While ShareFile is now a subsidiary of enterprise remote access software company Citrix, the legacy ShareFile team in North Carolina continues to create stable, easy to use tools which allow subscribers to easily access and data on remote devices. Although the web and mobile web versions of the product are very straightforward, the company has created apps for iOS, Android, BlackBerry and Windows Mobile. The mobile apps allow users to use the ShareFile service to upload and share data, request and receive confidential files, and permits access to data from almost anywhere.

ShareFile Mobile is free from most major mobile operating system application stores, and requires a ShareFile user account or service plan. More information is available at www.ShareFile.com.

Building Your Firm's Website is Easy with the Right Tools

8 Systems for Creating Client-Focused Websites



Let's face it. Very few accountants have the technological skills and artistic gifts to create an effective website. Hexadecimal color codes, meta tags and HTML are like a foreign language in a profession with its own cryptic lingo that includes insubstance defeasance and alternative minimum tax. Though many tax and accounting professionals may breeze through complex calculations in a neatly organized Excel spreadsheet, those skills rarely translate to designing an appealing webpage layout.

That's where website builder software specializing in the accounting profession come to the rescue. Their intuitive website design tools with interfaces similar to widely-used word processing programs enable individuals inexperienced with the underlying web technologies to build a website for their accounting firms. Web builders also offer attractive templates or professionally-built custom designs to take care of the aesthetic details for left-brained accountants.

Although web builder software makes it possible to create a robust and functional website with a minimal amount of effort, it is sad to see many firms putting virtually zero effort into personalizing their websites. Far too many firms just slap their firm name and contact information on the default template as if building a firm website was an item on their to-do list that they just wanted to mark as "done" without any hint of a web marketing strategy.

In fact, Google the words used in a template and you may find hundreds of accounting firm websites that are mirror images of each other. If your firm's website is nothing more than a barely-modified template, potential clients may not realize that it is a word-for-word copy used by many other firms, but they will certainly learn virtually nothing about you except that you provide tax and accounting services like everybody else. With an "about us" page containing stock photos and generic text, the first impression that potential clients have with your firm will be anything but memorable.

I remember a speaker at a web development conference I attended a few years ago who said, "your website is like a brick wall between you and your client." Regardless of whether the customization work is done in-house or outsourced, firms should be involved in website planning with the goal to demolish that barrier. A good start may be to add the firm's logo and choose a complementing layout and color scheme. A few more holes can be drilled into that wall by adding pictures and biographies of the firm's professionals highlighting activities and interests outside of work.

Whole bricks are knocked out when a firm goes beyond "brochureware" and adds dynamic content that is informative, interesting, and fun. Blogging is a great way for a firm to showcase its knowledge and expertise. If a firm writes and publishes blog posts regularly, website visitors will notice that the firm keeps up with law changes and local news. Additionally, blogging conveys a sense to the reader that the accountant is passionate about a particular topic and likes his or her job. Today's progressive firms effectively integrate social media with their websites to drive web traffic and provide a means for its practitioners to interact with friends, referral sources, clients and prospective clients.

Finally, bring out the cannons. Though this is outside the comfort zone of many accountants, the use of video can help the outside world feel as though they have met you. The video marketing strategies that firms employ vary across the spectrum of serious and informative to funny and really off the wall. While any of these approaches may be effective, the desired result should be to make an accountant seem personable and approachable. For a few good examples of firms using video to promote their practices, see "How Do You YouTube ?/ 10707797" from the June 2012 issue.

Not every accounting firm has the time or resources to implement all of the qualities of a world-class website. In some aspects, firms must be willing to make a commitment. For example, if a firm's most recent blog post highlights tax law changes from five years ago, it would be better for that firm to not have a blog at all.

However, many accounting firms that put forth the effort to personalize their site along with the assistance of a web builder have been rewarded. The web builder software vendors provide all the tools, and if the CPA firm lends a hand to chip away, the result can be like dynamite with a website that is a client relationship enhancer and a lead generating machine.

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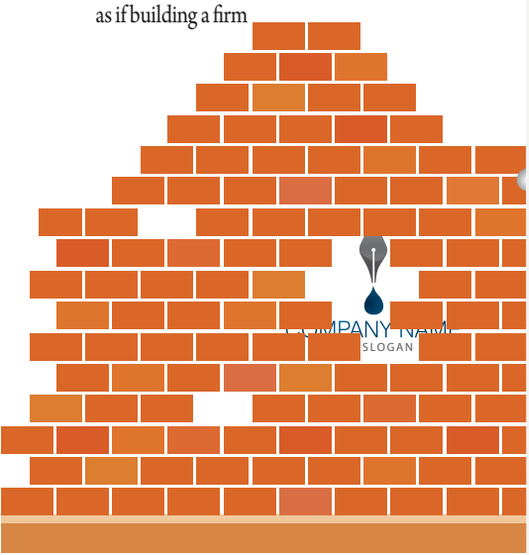
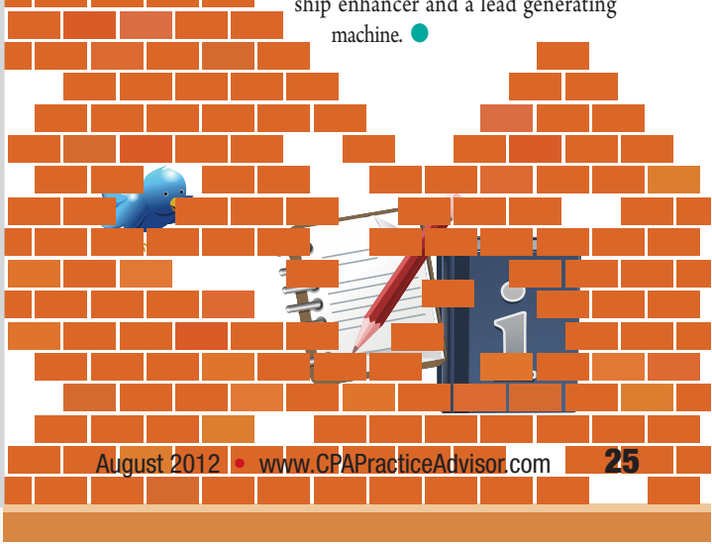




AFSB Accounting and Financial Site Builder

www.afsb.net

BEST FIT

Firms adding their own content to a template-based solution at a low cost.

STRENGTHS

- With a basic monthly subscription fee of $29.99 and a 20% discount if paid annually ($288/year, effectively $24/month), AFSB is the least expensive web builder among the products reviewed after the discount.
- Over 120 templates and thousands of variations available, including specialized templates for both CPAs and EAs.
- New templating system uses CSS technology, a billboard homepage feature and Flash
- AFSB's "Website Wizard" guides the user through creating a website step by step.
- Users can easily add an events calendar, a PayPal link to accept payments securely, Google Maps showing the company location, and social media widgets and unlimited pages of their own content.
- AFSB Sites include articles, monthly client newsletters, and financial calculators.
- The system allows firms to integrate logins for programs such as accounting and payroll, on-line e-filing tools, archiving tools or blogging engines.
- A free tool is included for creating online forms.

POTENTIAL LIMITATIONS

- Templates and pages are pre-populated with content that is fairly basic as is, but can be edited and customized to each firm's needs using a website wizard.
- Although the software allows for an unlimited number of additional pages, the content management is not searchable, potentially making it difficult to manage a very large number of additional pages.

Introduced in July 1999, AFSB Accounting and Financial Site Builder is now in its 13th year with a mission, per its website, "to offer websites that are affordable, designed just for tax and accounting business, and easy to manage." AFSB is part of Tenenz, Inc., which has served tax and accounting firms for more than 40 years.

AFSB has an excellent WYSIWYG text editor for changing page content with toolbars similar to Microsoft Word. Advanced users can add html code to any page. Although the amount of help in AFSB's Support Center is somewhat limited, users can e-mail technical support with questions. AFSB also provides a service to make changes on a website for its customers at $100 per hour ($25 minimum).

SUMMARY & PRICING

AFSB reports that it has a satisfied customer base and a high retention rate because of four factors: its low cost, sites are created and available for editing seconds after sign-up, AFSB does not self-promote in the footer of its customers' websites, and firms can easily add their own services.

AFSB's basic monthly subscription fee is $29.99 and a 20% discount is offered if paid annually ($288/year, effectively $24/month). There are no setup fees or constricting contracts. For an optional one-time $30 fee, AFSB provides search engine optimization and registration services. If requested, AFSB modifies templates or creates custom site designs for a fee that ranges from $100 to $250. Currently, AFSB is offering a 60-day Free Trial.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10738428

Build Your Firm

BuildYourFirm.com

BEST FIT

Build Your Firm is a good fit for firms that want to outsource both the design and written content in the process of building a completely customized website, especially those highlighting a particular specialization or industry niche.

STRENGTHS

- Recently increased number of e-mail newsletter articles and they are released twice a month (1st and 15th of each month), as opposed to most vendors that release them once a month.
- E-mail marketing system can be tailored to segmented lists of an accounting firm's client base.
- Client Center provides one easy login box for many different services.
- Experience helping firms design a website around an industry niche.
- Branded WordPress blog integration (additional fees apply)

POTENTIAL LIMITATIONS

- Firms that want complete control for making changes themselves are given access, but functionality is limited to minor changes such as text edits. Build Your Firm prefers that change requests go through the firm's account manager.
- Integrated portal has limited functionality. However, firms can go with Build Your Firm's partner Sharefile if the integrated portal does not meet their needs.

In 2003, Build Your Firm got into the website development business because workshop attendees asked its management to develop websites with search engine optimization built into the initial design along with pay-per-click advertising, which accounting web builders were not providing at that time. Each website that Build Your Firm develops is unique and designed around an accountant's practice.

Factors such as a firm's geographic marketing area, type of accounting firm (bookkeeping, EA, varying sizes of CPA firms), and accounting software are taken into consideration. Build Your Firm assigns a website designer to an accounting firm's website project who writes 95% of the website content. With this approach, the accounting firm is only responsible for writing bios and reviewing the content before the site goes live.

Build Your Firm offers a Client Center so that accounting firm clients can go to one area of the website to log in to various SaaS applications such as a web portal, bill.com, or QuickBooks Online. The Client Center was designed with a vendor neutral approach to meet the needs of accounting firms using a variety of applications.

One of the new services offered this year is the integration of WordPress blogs into a website. Build Your Firm will design and set up the popular blogging software, mirroring the website branding with the firm's existing website.

SUMMARY & PRICING

Because Build Your Firm takes responsibility for the website development process and does not push it to the firm like some other template-based providers, it is best suited for firms that want the vendor to complete both the customized website design and content.

The recurring monthly fee for the starter package is $49.99 per month. The premier plan at $83.33 per month adds features including search engine optimization, file transfer and the client center. Niche websites are also $83.33 per month and have a setup fee that typically averages from $1,000 to $1,500 depending on the extent of the customization requested and complexity of the content to be written. QuickBooks hosting and WordPress blogs incur additional fees. There is no annual commitment and Build Your Firm offers a free trial period of 60 days.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10738429

AccountantsWorld Website Relief

www.AccountantsWorld.com

BEST FIT

Small accounting practices, particularly those using the AccountantsWorld Power Practice suite, who will benefit from integration with professional programs and client portals.

STRENGTHS

- There are hundreds of templates with an unlimited number of combinations to choose from.
- Free unlimited support and web-based seminars.
- Seamless integration with the AccountantsWorld online applications.
- Online tax organizer allows clients to enter and organize their tax data, which can then be exported from Excel into tax software.
- Tools for search engine optimization, local directories, and listing in the AccountantsWorld Directory of Accounting Professionals.
- Firms can select from a large library of images or upload their own.

POTENTIAL LIMITATIONS

- Unlike some competitors that allow for an unlimited number of pages, Website Relief is limited to a maximum of 40 pages and therefore may not work for a firm that plans to build a large and intricate website.
- Free domains included in the subscription are owned by AccountantsWorld. Although a firm can transfer the domain upon cancellation for a $50 charge per domain, this may be an issue for firms that always want to maintain ownership of its domain.
- Social media integration is limited to Facebook widgets and Twitter buttons.

AccountantsWorld offers a web-based suite of integrated applications that include accounting, payroll, and document management. Its web builder product, Website Relief, was introduced in 2002. Recent improvements include easier navigation through the site builder wizard, new template styles, better integration for PDF newsletters, and full browser compatibility.

As part of the service, AccountantsWorld offers its customers a free multipoint checkup to help them get the most out of their web presence, which includes a review of a website's completeness and aesthetics. Free assistance is provided for search engine optimization, search engine marketing, and web directory listings. Tutorial videos are provided on the AccountantsWorld website teaching users how to create a great website, incorporate website best practices, market a website, and monitor website traffic.

SUMMARY & PRICING

Because it offers direct access to the other AccountantsWorld online applications, Website Relief is a good fit for firms using the AccountantsWorld suite that want integrated productivity and online marketing tools.

There is no setup cost with Website Relief, and the basic recurring cost is $59 per month or $595 per year, which includes a standard listing in AccountantsWorld Directory of Accounting Professionals. Firms can upgrade to a Silver listing (enhanced listing) for $195 per year or a Gold listing (top-of-the-page preference) for $495 per year. Firms can add additional e-mail addresses in blocks of five for $50 per block.

AccountantsWorld offers Premier Website Services for firms that either want to customize a website beyond the tools that are offered by Website Relief or don't have time to use the tools to create their own website. With this service, the designers at AccountantsWorld create a personalized template and custom pages with images and flash files for $99 per hour.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10738426

CCH Site Builder

www.CCHwebsites.com

BEST FIT

Firms using the CCH ProSystem *fx* Suite and firms that want to add state-specific tax alerts or premium content (such as the CCH Tax Guide and toolkits) not offered by other vendors.

STRENGTHS

- Integration with ProSystem *fx* Portal, CCH File Share, GainsKeeper, and ProSystem *fx* Tax Notebook.
- The ability to easily preview changes made to a page before publishing.
- A questions/comments button that launches a contact form. The built-in Lead Generator module tracks contacts obtained from completed forms.
- Excellent newsletter content from CCH, with many options for displaying and distributing newsletters, including monthly *e*Marketing of newsletters to customer base.
- Scrolling tax alerts, both federal and state. Firms can select to only show tax alerts for certain states.
- Color-coded events calendar can be used to display tax and firm events.
- Expansive library of interactive financial tools and calculators.
- Available as an *e*Content solution for firms with existing websites in need of dynamic updates. eContent package allows firms to plug in newsletters, tax alerts, and financial tools to their existing website.

POTENTIAL LIMITATIONS

- No built-in blogging engine. However, users can link to an external blog.

The ProSystem *fx* Suite from CCH offers an integrated set of tax and accounting software for CPA firms. Along with an easy integration with the suite, CCH Site Builder features a sleek and user-friendly interface for building a CPA firm website. The product was introduced in 1997, so CCH has many years of experience helping firms to establish a web presence.

For firms that want to build their own site, CCH Site Builder has over 70 templates to choose from, each with options to easily modify the color scheme, pictures, and navigation buttons. Firms can easily switch templates with the click of a button, at no additional charge, and without the help of a webmaster or other IT support. Editing and styling text with Site Builder is as easy as working with a Microsoft Word document. The interface is also very intuitive for uploading images and adding custom pages.

For firms that want something different from the templates offered, CCH has a custom design team on staff. CCH quotes a fee for this service after a consultation.

SUMMARY & PRICING

CCH Site Builder is a strong template-based product, and because of its user-friendly interface, it is ideal for firms that want to build a site quickly and have control over customization and making changes. Its integration with the ProSystem *fx* suite makes it a good candidate for firms using other CCH applications, and firms may also want to consider it because of its impressive set of calculators, resources included in the premium content, and eNewsletter content with federal and state tax alerts.

The standard package costs $1,290 in the first year including setup. The annual renewal cost is $995. Other features, such as the CCH Tax Guide, toolkits, and e-mail are available at additional costs. Potential customers interested in custom website design packages and search engine optimization services should contact CCH for a quote. CCH offers a free 30-day evaluation period (no credit card required).

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10738431

Thomson Reuters' Web Builder CS, Powered by Emochila

CS.ThomsonReuters.com/web-builder

BEST FIT

Tax and accounting firms that either want a customized design or want to build a site based on a template. Since the product is owned by Thomson Reuters and contains a template for a client login page to NetClient CS, as well as a basic file exchange portal and integration with NetClient CS, it could be considered by firms using the CS Professional Suite.

STRENGTHS

- Templates have attractive designs, and it is easy to switch between templates.
- The tax tools, news, and financial guides provide plenty of helpful information and resources for website visitors.
- Easy interface within the administration page for managing a site's page structure and menus.
- Online appointment requests, referral submission forms, and client testimonial collection tools.
- Technical support and website edits (except custom design changes) are included in the monthly service fee, so firms don't need to learn the back-end administrative tools.

POTENTIAL LIMITATIONS

- Built-in blogging system is proprietary. While it is simple and easy to use, it does not contain advanced features of other blogging software (such as WordPress). However, third-party blogging platforms can be integrated.
- No mechanism to prevent webform spamming, but firms must approve testimonials before they are posted.

Since 2003, Emochila has been one of the leading website builder service providers to lawyers and CPA firms. On December 9, 2011, the Tax & Accounting business unit of Thomson Reuters acquired Emochila. Not to be confused with Thomson Reuters' previous website builder software, the current product offered is known as Thomson Reuters Web Builder CS, Powered by Emochila (however, throughout this review, I will refer to it as simply "Web Builder CS"). Since it is built on the Emochila platform, it is completely different than the former Thomson system. The company is in the process of helping customers that had built sites using the previous Thomson Reuters Web Builder CS software to upgrade to the Emochila platform.

Web Builder CS has client firms with both hands-on and hands-off approaches to their websites. For the "hands-off" firms, custom website design services are provided for an additional fee. Firms can contact the technical support team to handle minor edits (such as text changes), which are included in the monthly service fee.

Though only about 29 different templates are offered, they are very distinctive. Some have large images for the home page while others have more text. Users can easily switch templates by clicking on a thumbnail image. Compared to its competitors, Web Builder CS has one of the easier interfaces for managing the page structure (creating a splash page, adding subpages, reordering submenus, etc). For editing page content, both a WYSIWYG editor is available with an interface similar to a word processor and an html code editor is provided for advanced users.

Technical support is available both by phone and e-mail, and an online knowledgebase can answer many frequently asked questions. Thomson Reuters also offers the ARNE Community, an online peer-to-peer support system through which professionals can share tips and advice on all products in the CS Professional Suite.

SUMMARY & PRICING

It will be interesting to see the Emochila platform develop as it further integrates with the Thomson Reuters CS Professional Suite. Its combination of solid web design, marketing tools, and user friendly interface helps thousands of tax and accounting firms build an online presence. Pricing starts at $70 per month, which covers the hosting, content, features and support. There is no up-front setup cost, and the template designs are free. Custom design work ranges from $500 for a logo, $1,250 for a custom designed site, and $2,000 for a fully animated designed site. Interested users can try the product free for 30 days.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10737428

CPASiteSolutions CompleteWebSuite

www.CPASiteSolutions.com

BEST FIT

Firms that want a site from one the best template-based web builders along with comprehensive web marketing services, and firms that want to build a website quickly. CPASiteSolutions boasts that it only needs 15 minutes of a CPA's time and that the dedicated webmaster often completes the site within 2 days.

STRENGTHS

- 366 great templates to choose from, including smart designs which auto-recognize screen sizes and devices for a perfect fit (unique among products reviewed)
- Great point-and-click WYSIWYG editor makes it easy to add and format text. Essentially, changes are previewed as you make them on the page. Advanced users can use an HTML editor.
- New site styles, features, and upgrades are released almost monthly. As a result, the product is constantly improving.
- Newsletters contain a lot of content (10 articles each month) and are written by CPASiteSolutions' team of CPAs and MBAs.
- The CPASiteSolutions website and online Help Center is full of answers to frequently asked questions, explanations, tutorials, videos, and web marketing ideas.

POTENTIAL LIMITATIONS

- In general, newsletters contain only national content (for example, they do not contain state-specific tax news). However, a firm can write its own newsletter.
- Firms looking to make modifications to the website style (the layout, for example) on their own will find it to be very restricted to the template and will need to contact CPASiteSolutions for changes.

CPASiteSolutions has been helping accountants create websites since it was founded in 1999. With a strong belief in constant and never-ending improvement, the company adds new designs and product enhancements nearly every month. After having evolved for 13 years, CPASiteSolutions' impressive offering includes hundreds of professional designs, thousands of pages of content written by CPAs, and a long list of add-on features.

CPASiteSolutions is a good fit for both firms that want to enter content on their own or want to have all of the changes made for them. Firms will find the WYSIWYG editor very easy for making minor text edits. Firms that do not want any part of the website administration back-end can call or e-mail their assigned dedicated webmaster with a to-do list.

SUMMARY & PRICING

With an impressive array of templates and features, CPASiteSolutions has created and maintained over 5,000 websites for accounting firms and solidified its position among the leaders in the industry.

CPASiteSolutions offers three tiered plans: Silver at $49.50 per month, Gold at $69.50 per month, and Platinum at $99.50 per month. The Gold plan offers all of the features of the Silver plan plus a dedicated webmaster, remote assistance, more designs and a more robust integrated portal. The Platinum plan adds site statistics, search engine marketing and a social media marketing system. The first 60 days are free for all plans, and there is no contract or commitment. Unlimited technical support is provided by phone, Live-Help IM chat, and e-mail.

Local search engine optimization is a one-time fee of $499. Custom website design ranges from $195 to $495. Custom copywriting is $1 per word with a 150 word minimum. Other add-on features available for additional fees include extra client portal storage, professionally produced online video, online payroll processing system, online accounting system, online tax software hosting, and managed WordPress blogs.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10739706

CPAsites.com

www.cpasites.com

BEST FIT

CPA firms that want a unique design or features that other template-based providers do not offer. CPAsites.com takes pride in being 100% CPA-owned and managed, which gives them the ability to relate to the online needs of CPA firms.

STRENGTHS

- CPAsites does not use pre-designed templates, so all websites are unique.
- Custom programming and graphic design services are included.
- Tax acts and breaking tax and financial news are fed into sites quickly, within hours or days.
- Financial calculators are on-site and branded with the firm's name and logo.
- Firms that subscribe to the website service can reprint articles in a local newsletter and can use them in any way they wish.

POTENTIAL LIMITATIONS

- Since CPAsites.com does so much up-front design work, firms are required to make a one-year commitment. However, after that time, a firm owns its website (except copyrighted content) if it decides to drop the service.
- Except for initial design modifications and customers on the Platinum plan, CPAsites.com charges $50 per hour to make changes to a website (the $25 minimum applies to most changes).

Founded in 1997, CPAsites.com was one of the pioneers in the accounting firm website market. CPAsites.com follows a business model of creating custom-designed websites based on CPA firms' requests rather than canned templates.

Firms that request access to their website may use CPAsites.com's Website Manager to edit text, add pages, upload images, and make other changes to their website on their own.

SUMMARY & PRICING

CPAsites.com offers four prices levels: a Bronze plan at $300 per year ($25 per month), a Silver plan at $50 per month, a Gold plan at $85 per month, and a Platinum plan at $150 per month. A detailed list of features for each plan is available at http://www.cpasites.com. There is no setup cost for firms that make a 12 month commitment to the service. Modifications to a website are generally free at the outset, and then CPAsites.com charges $50 per hour ($25 minimum) to make changes to a firm's website except for customers with a Platinum plan which includes one hour each month for edits and updates.

Read the full review of this product exclusively online at www.CPAPracticeAdvisor.com/10738427

How Glenn Hanner Became Top Dog in the Veterinary Accounting Niche

A niche business model and a stellar staff are key components in this firm's substantial growth.

Niche marketing isn't a new concept. It's a sound and proven business model that's been around for years, yet has only recently started to bubble up in the accounting profession.

"We followed a niche business model for years, but not on purpose," stated Glenn Hanner, CPA.CITP, owner of Hanner & Associates, PC (Accountants and Advisors). "It's just that over time we accumulated several veterinary clients and developed a specialty in that industry."

Only within the last five years has Hanner implemented a dedicated niche business model. His decision to do so was based primarily on creating a "career firm."

"We have a lot of highly skilled people on staff and we wanted to ensure they stayed with the firm long term," stated Hanner. "We needed to grow so I could provide a career for these folks. That's when I decided to really dedicate myself to niche marketing."

Entering a new niche isn't a piece of cake. It takes time, effort, and a lot of patience according to Hanner. "Growing a niche business isn't something that happens overnight. You can't just say 'I specialize in dentists.' You have to immerse yourself in the industry."

Hanner has spent the last five years growing a veterinary client base. The firm dedicated resources and money to branding and website development. Staff members on the Hanner Vet Service team also spend a great deal of time at veterinary events and aligning with vet-based associations, like VetPartners.

"If we were going to support veterinary clients with quality accounting services, we had to really understand the niche. That first year I took a crash course—educating myself by attending conferences and joining the appropriate

STATS AT A GLANCE

Year founded: 1986

Total employees: 15 F/T, 1 P/T

Home base: Bedford, TX

Firm description: Full-service tax and accounting firm focused on small businesses

Technology of Choice: Thomson Reuters Suite, Bill.com, Right Networks, SurePrep

associations. This year our team will spend more time at veterinary events than at accounting conferences."

Hanner & Associates has become an integral part of the vet association world. To date, Glenn Hanner has facilitated workshops on tax planning for multiple Texas-based veterinary medical associations, will attend the Texas Southwest Veterinary Symposium as a vendor (complete with a branded booth), and sponsors the local vet association.

Hanner reiterated, "You have to become immersed."

Chasing a new niche takes perseverance, and the Hanner team has definitely put in the time. "We went from being just present in the vet world to being known as a go-to source for industry experience."

hanner VetCPA.com | Veterinary Accountants Advisors

Defining Your Firm and Setting Up the Proper System

Hanner & Associates started with about three or four veterinary clients. Today the firm serves more than 30 vet clinics and plans to add 10 more in 2012.

Hanner's success is the result of planning and doing the necessary homework. In fact, he cautions that firm leaders should not move forward with a niche business model until they've given proper thought to defining their business goals and strengths.

"Accounting professionals have to first define their firm," Hanner explained. "What I mean by this is that they have to look at all their clients and decide who they most enjoy serving and who they are best at serving. If it's doctors, than go after that niche."

Hanner further explained that the days of being all things to all clients are over. Firms can no longer support a diverse clientele and be profitable. It's all about becoming an expert in select niches and then dominating those industries.

Understanding the accounting requirements of a specific niche is one thing, but it's also critical to have the proper system set up within the firm to handle client work. This includes both technology and human resources. Hanner made sure to implement the right software solutions to support a highly efficient workflow, but he also made sure he had the right staff in place.

Before entering the vet niche, we conducted an evaluation of our staff to identify the collaborative skill set. We have seasoned CPAs, accountants, and bookkeepers—all highly capable of performing the work. As a team, we have developed and implemented systems dedicated to the success of our veterinary clients. Although the vet industry is fairly sophisticated in terms of accounting needs, I was confident that our team could handle daily work and problem solve without hands-on management," Hanner stated.

Hanner explained that his firm's process is solid. "With an exceptionally capable and self-sufficient team in place; the firm runs like a well-oiled machine."

Having a dedicated team to run the day-to-day also allows Hanner to focus on higher-level strategy—that is, bringing in new business and growing the firm. In other words, to quote business sage Michael Gerber, Hanner is free to "work *on* his business, not *in* it."

Getting Out from Under the Fear Factor

Offering expert niche services enables firms to apply value pricing and charge a premium for services that are of higher value to clients.

"We put a lot of time and money into learning the niche. We also had to customize a services package and provide a dedicated team, so I had to rethink our pricing. We simply weren't charging enough to make a profit. Of course, raising pricing brings with it the fear of losing clients," Hanner explained.

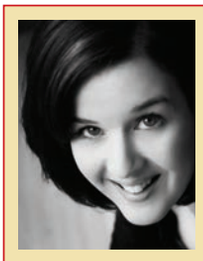
Hanner admitted that in the back of his mind was a nagging fear of losing clients. And the thought of losing a big client was even scarier. At the end of the day, however, he realized that with niche expertise, his firm would continue to bring in new clients, which decreased some of the pressure.

"I set my fees with confidence. I know we provide premium services. So, if I have a prospect or client that doesn't want to pay, I explain that they are free to go elsewhere...in a very friendly manner of course," Hanner stated.

Getting out from under the fear factor marked a turning point for Glenn Hanner. Over the past five years the firm reports a steady, healthy growth.

"It all fell into place nicely," Hanner recalled. "When we first decided to enter the vet industry, we updated our website with niche-specific info and started to market locally. Within only a few days I got a call from Bank of America's veterinary practice solutions division. They are now a primary source of referrals for our firm, along with all the associations we participate in."

The firm's transition into the vet niche certainly didn't happen overnight. Hanner and his team dedicated a lot of time and energy to learning the industry and getting in with the appropriate organizations. Fast-forward to today and Hanner finds his firm in the vanguard of those serving the veterinary market. In fact, some might say that Hanner & Associates is leading the pack. ●



Kristy Short, Ed.D

Kristy is a partner in RootWorks Communications (RootWorks.com) and president of SAS Communications 360 (SAScommunications360.com) — firms dedicated to providing practice management education, branding, marketing, and public relations services to the accounting profession. She is also a professor of English and marketing at University of Phoenix and Cleary University. You can reach her at kristy.short@cpapracticeadvisor.com.

If you'd like us to consider sharing your firm's story of innovation in a future issue, go to www.CPAPracticeAdvisor.com/great-practices and complete the short form. *We'd love to hear from you.*

Establishing Standards for the p

A paperless accounting practice is in many regards very similar to one based on paper, although it will be much more efficient if good practices and standards are implemented during the transition to paperless. Many firms start the move to paperless by scanning documents and storing them on a hard drive in some sort of homegrown folder structure. This gets the process started, but standards are hard to enforce and implement. Problems with this approach include:

- No enforceable naming structure for client folders and documents
- Minimal and difficult to use security features
- Weak and frequently unusable workflow processes
- Lack of granular security control
- No efficient document capture methods
- No way to efficiently and securely share documents with clients
- Ability to remotely access documents

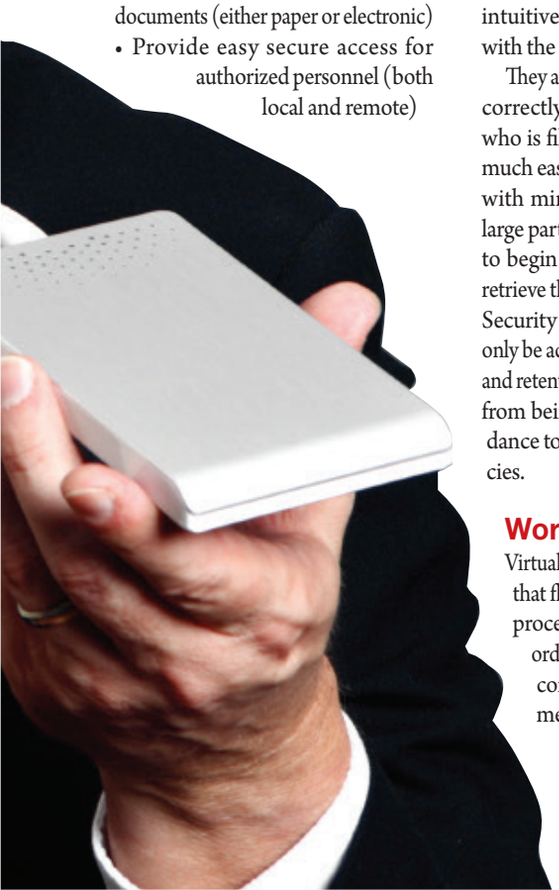
Most of these problems occur because there is no way to force a user to name a document or apply security in a standard way. If someone gets in a hurry or simply forgets, it is quite simple to name a file incorrectly, file it in the wrong folder, and/or apply security incorrectly. In addition, there is no way to workflow a document through a business process effectively. Typically, Adobe or some other package is used to scan documents one at a time, with no sort of batch input.

In order to overcome the shortfalls of using a Windows Explorer structure, it is best to start with an electronic document management system (EDMS)

The Paperless Office

which has the feature set to overcome the issues raised above. In general, most mid- to high-end document management systems should allow you the ability to:

- Create document templates with default naming and security
- Effectively control document security and provide an audit log
- Effectively provide workflow (both rules-based and ad hoc)
- Provide granular security classes for both client folders and documents
- Provide multiple capture points for documents (either paper or electronic)
- Provide easy secure access for authorized personnel (both local and remote)



Document Templates

Document templates provide a standardized method of entering document descriptions and applying security/retention and other settings. Default values should automatically be added to the description and minimal data entry by the document creator should be required. Required data fields are a must so key information is not ignored or forgotten. The goal of a document template is to provide a fast, easy and intuitive method to file a document with the minimum number of steps.

They also insure documents are named correctly and consistently no matter who is filing the document, making it much easier to find the document later with minimum effort. Remember, a large part of filing documents correctly to begin with is to have the ability to retrieve them later as quickly as possible. Security settings allow documents to only be accessed by authorized personnel and retention policies protect a document from being edited or deleted in accordance to regulations or company policies.

Workflow

Virtually every business has documents that flow through some kind of work process. Expense reports, purchase orders, and travel requests are some common examples. As the document passes from one person or department to the next, someone acts on the information and files it or passes the document on for review or further action. The process of accurately tracking the document's progress from its originator through to its final destination is known as document workflow management. Ideally, this process is started when the document is filed in the document management system. Once again we move to the document template. A good EDMS should provide a method to automatically workflow the document based on the document template selected. Document templates are capable of doing a number of things automatically without user intervention.

Tip: A good EDMS should apply naming conventions, security classes and any necessary workflow at the time the document is added to the system. This prevents a user from neglecting any of these items out of haste or ignorance (particularly if these items can be applied automatically without user input).

Capture

Entering documents into an EDMS can be a challenging task. More and more of the documents are arriving at firms in electronic format without any paper copies. This is fine as long as the EDMS has a way of importing or batching these documents into the system without a lot of user interaction. Most vendors will have an import utility which can be used to file the documents in the correct location according to document templates as mentioned above.

Document Capture is an integral part of any solution to the paper problem we all face. It usually consists of an input device (scanner), software to assist in sorting and identifying (indexing) the paper, and storage (disk space) to file the electronic documents for retrieval. Beyond simple document capture (imaging), many things can be done during the capture process to automate the process. Barcode recognition, database lookup, forms processing, and OCR are all advanced methods of capture that can boost productivity during the capture process. Finding a knowledgeable vendor to help analyze the capture process is critical to successfully implementing a solution.

Document Access

The last standard implementation piece for an EDMS is to provide reasonable and effective retrieval of documents from a variety of sources. Users today are more mobile and the vendors should provide the firm with a way of accessing their documents from a variety of sources even external to the firm. They should also provide the necessary tools to share client's documents securely with the clients without using email. Email is unsecure and can be unwieldy once documents reach a certain size. A good solution is to have an EDMS that has an embedded branded portal capability which allows a firm employee to share documents back and forth with clients quickly and securely in the cloud.

Implementing an EDMS can be a challenging task, but once standards are developed by the firm in conjunction with the selected vendor, it can make the firm much more efficient. This allows it to add clients without increasing the number of employees as each employee can process more information. It is crucial the EDMS support as many of the document standards as possible without requiring user intervention for the system to be readily accepted. ●

By Andrew Bailey

Andrew Bailey has 20 years of experience in the software industry. Currently, he is president of Cabinet NG, a document management provider based in Madison, Alabama. Andrew can be reached at abailey@cabinetng.com. For more information visit www.cabinetng.com.

The Next Generation of Leadership

We are headed toward a massive transition in leadership at firms across the country as the current leadership gets closer to retirement. Some firms have already successfully transitioned, others are preparing, and then, there are those that don't yet have any plans in place. The transition discussion is a buzz at the conferences I've recently attended – both among attendees and speakers. And, tensions are high between the very generations whose roles are about to shift, which is extremely concerning.

The State of the State

Current leadership often complains they can't find quality candidates to fill the pipeline. Pointing to a generation that doesn't want to put in the hours or work for it. They use words like lazy and entitled to describe them and say they waste time using technologies like mobile and social media. The younger generation uses terms like out-of-touch and archaic to describe the people they will succeed. They point to a need to do things differently to succeed in the future and some suggest throwing out the old model completely.

Jim Boomer, CPA.CITP

Jim Boomer is a shareholder and the CIO for Boomer Consulting, Inc. He is the director of the Boomer Technology Circles™ and an expert on managing technology within an accounting firm. He also serves as a strategic planning and technology consultant and firm adviser in the areas of performance and risk management. In addition, Jim is leading a new program, The Producer Circle, in collaboration with CPA2BIZ and the AICPA.

So who's right? I'll show you here how the correct answer lies somewhere in the middle.

Listen Up Emerging Leaders

I've been hearing an increasing number of people from my generation (the emerging partner group) spreading a message that the old model is antiquated and needs to be replaced by completely new thinking. I agree that we need to do things differently but a complete reboot isn't necessary. Emerging leaders need to step back and understand a few things about those that have come before us.

- First, they have years of wisdom and professional experience that we can and should tap into if we are smart business people.
- We also need to appreciate everything they've done to set up the opportunity that is currently ahead. It would not exist if not for the hard work they put in throughout their careers.
- We need to realize it's hard to let go of something you've been doing your whole life. We may have to temper our expectations of how quickly we are going to ascend in the firm.
- We also need to present our new ideas with respect and ask how they fit in with current leadership's view of the environment.
- Finally, don't push too hard. This is an **emotional transition** that takes time. They need to work through it personally before they can work share the plan or roadmap with anyone else.

Tips for Current Leaders

Seasoned professionals must think back to earlier in their own careers so they can better empathize with what the emerging professionals are thinking, feeling and doing. A few years ago, I listened to Bill Reeb speak on generations – he read an article to the audience that listed all the gripes current management had with the next generation. Only after the audience (made up mostly of seasoned professionals) had finished their wave of head nods in agreement did he reveal that the article was from many years ago and was actually written about the Baby Boomer generation. Truth be told, you've been in their shoes and, likely, someone judged your perceived intentions (or lack thereof) at some point in your career. So let's look for the positives that we can leverage to move forward toward a successful transition.

- First and foremost, the up-and-coming leaders bring a fresh perspective that is important to the future of the firm. They also bring new ideas and skills to the table as well; especially in the area of technology, leverage these to the firm's advantage.
- Open your mind to new ways of thinking and doing things. Considering how these ideas might fit into how you've traditionally done things.
- Coach and mentor young professionals but also challenge them. This involves stepping back, which can be emotional and difficult to do but is necessary to the transition.

Finding a Middle Ground…TOGETHER

Although Thoreau wasn't referring to the accounting profession when he said "things don't change, we change," I think this quote is a great way to approach the coming of ages. The sooner we stop throwing daggers at each other based on what the other perceives to be wrong and start focusing on the positive aspects we all bring to the table, the quicker we can start blending our perspectives and planning the transition – **together**. This building tension and divide must stop. It will derail, delay and even destruct the impending and important shift in leadership, and we must all come together now to ensure a successful transition.

Put an action plan in writing that spells out the transition timeline, what/when activities will be transitioned and how approaches can be melded. This will probably require many emerging leaders to 'tap the brakes' and current leaders to 'hit the gas,' but **working together** you can figure it out. ●