

The role that technology plays in our everyday lives has increased dramatically over the last decade, and this publication and our Readers Choice Awards have chronicled many of these changes.

From integrated tax and workflow management processes, to digital documentation, client collaboration and even older terms such as the "paperless office," professionals must stay aware of potentially beneficial technologies and best workflow practices in order to stay competitive in the tax and public accounting space.

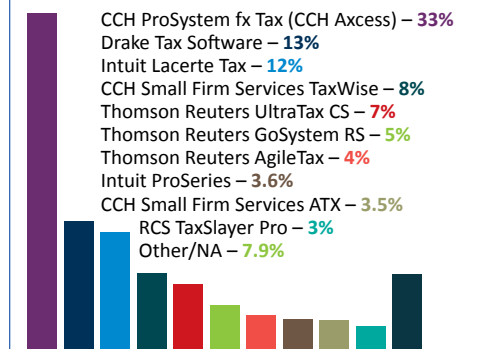
Among notable changes in this year's Awards are the broad adoption of cloud services for virtually every aspect of client services and firm management, continuing growth in the use of tablets and non-traditional mobile devices, and enhanced workflow management systems that help firms operate more efficiently and productively.

The Awards are the results of the votes of our readers, allowing them to shine a spotlight on the products and services they use in their firms, whether for direct client work or for firm management, as well as some of the personal and general technologies they use in their daily lives.

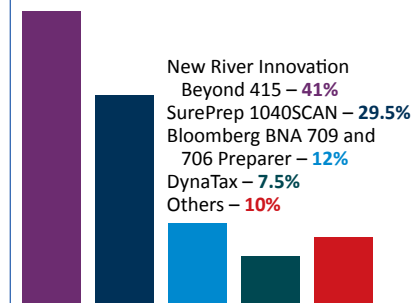
We would like to say thank you to the more than 4,000 tax and accounting professionals who voted in this year's Awards.

WHICH IN-FIRM TECHNOLOGIES DO YOU USE?

FEDERAL/STATE INCOME TAX COMPLIANCE



SPECIALTY SYSTEMS & TAX PREP TOOLS



Tax Planning Systems

1. Drake Tax Planner
2. CFS Tax Software – TaxTools
3. Intuit Lacerte Tax Planner

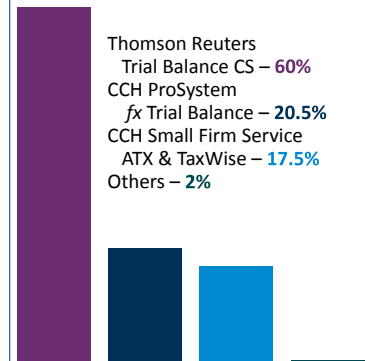
Estate Planning Systems

1. Thomson Reuters ONESOURCE
2. CCH ViewPlan Advanced
3. Bloomberg BNA Estate Planner & Gift Tax Planner

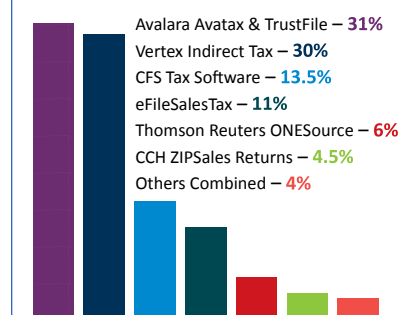
Write-Up

1. PCSAI Client Write-Up
2. Drake Client Write-Up
3. Intuit QuickBooks Accountant

TRIAL BALANCE



SALES & USE TAX



Sales & Use Tax Exemption Certificate Management

1. Avalara – AvaTax Certs
2. Thomson Reuters – ONESource Exemption Certificate Mgmt.
3. Vertex Inc. – Exemption Certificate Manager

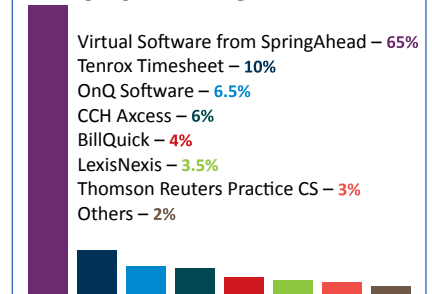
Audit/Engagement Tools

1. Thomson Reuters PPC SMART Audit Suite
2. CCH Knowledge-Based Audit tools/ Knowledge Coach
3. Capital Confirmation Confirmation.com

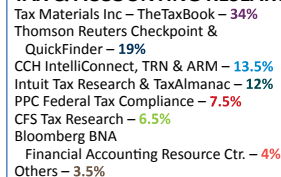
Budgeting/Forecasting & Business Intelligence Tools

1. SageWorks ProfitCents
2. Thomson Reuters Financial Analysis CS
3. CCH ProSystem fx Profit Driver

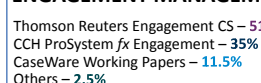
PRACTICE MANAGEMENT

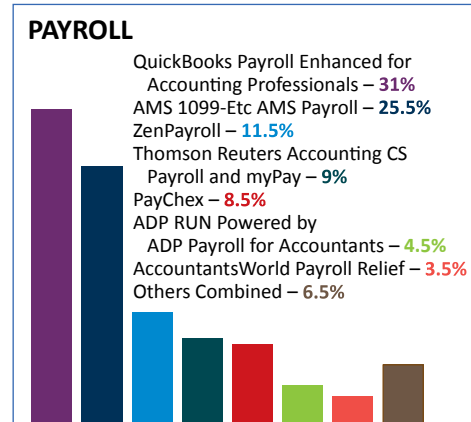
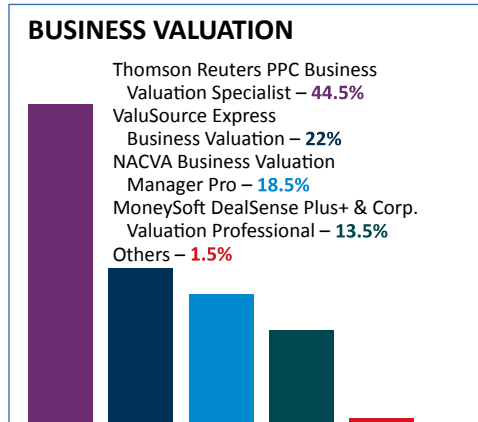
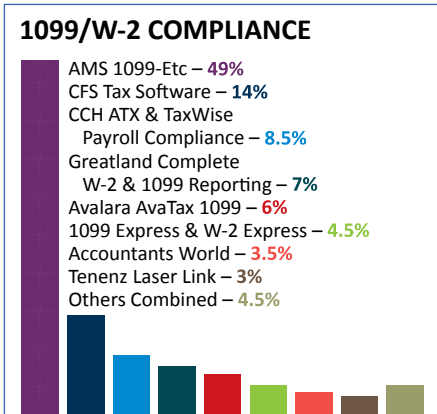


TAX & ACCOUNTING RESEARCH SYSTEMS



ENGAGEMENT MANAGEMENT





TIME & INVOICING

Client Portals

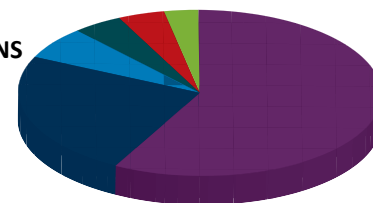
1. XCM Solutions
2. SmartVault
3. DocIT Web Client Portal

Tax Document Automation

1. Drake GruntWorx
2. Intuit Tax Import for Lacerte & ProSeries
3. CCH ProSystem fx Scan

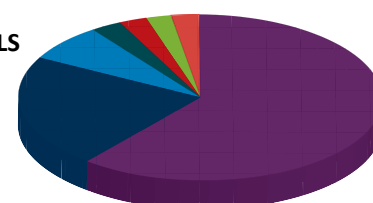
ONLINE INVOICING/ BILL PAYMENT SOLUTIONS

- Intuit Payments – 58%
- Bill.com – 24%
- Freshbooks – 6.5%
- Xero – 4.5%
- Sage Billing Boss – 4%
- Others – 3%



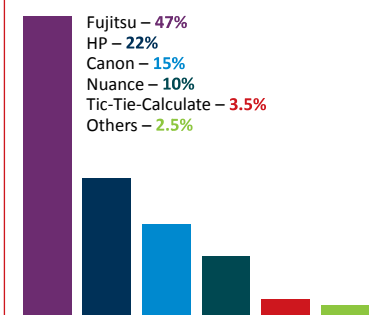
TIME TRACKING & TIME ATTENDANCE TOOLS

- Wasp Barcode WaspTime – 61%
- QuickBooks Time Tracker – 22%
- CountMeIn – 7%
- SwipeClock – 3%
- BigTime – 2.5%
- Chrometa – 2%
- Others – 2.5%



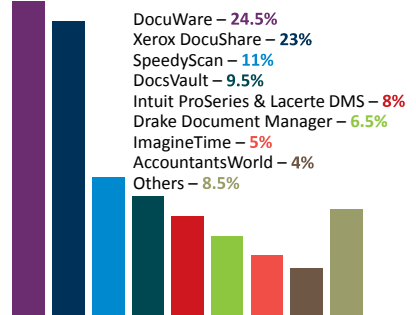
DOCUMENT MANAGEMENT UTILITIES

- Fujitsu – 47%
- HP – 22%
- Canon – 15%
- Nuance – 10%
- Tic-Tie-Calculate – 3.5%
- Others – 2.5%



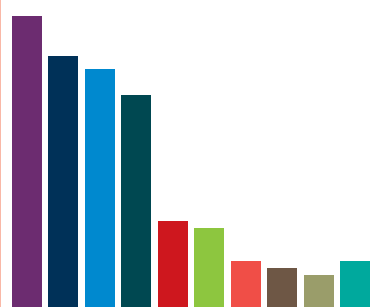
DOCUMENT MANAGEMENT & DOCUMENT STORAGE

- DocuWare – 24.5%
- Xerox DocuShare – 23%
- SpeedyScan – 11%
- DocsVault – 9.5%
- Intuit ProSeries & Lacerte DMS – 8%
- Drake Document Manager – 6.5%
- ImagineTime – 5%
- AccountantsWorld – 4%
- Others – 8.5%



CLIENT-SIDE ACCOUNTING

FIXED ASSET MANAGEMENT



Small Business Accounting - Installed Programs

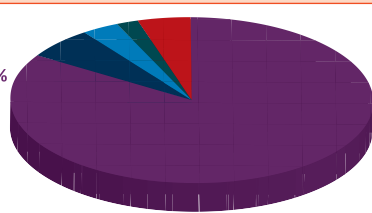
1. AccountEdge (formerly MYOB)
2. Intuit QuickBooks (any version)
3. Adagio Accounting

Small Business Accounting – Web-Based

1. QuickBooks Online
2. Intacct
3. Sage One

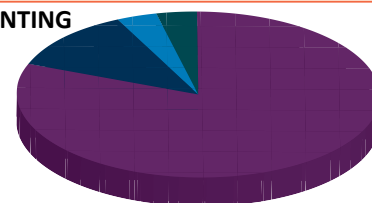
RETAIL ACCOUNTING/ POINT OF SALE

- Intuit QuickBooks Point-of-Sale – 84%
- Sage POS & Payment Solutions – 6%
- Microsoft Dynamics POS – 3.5%
- AccuPOS Retail POS – 2%
- Others – 4.5%



NOT-FOR-PROFIT ACCOUNTING

- Intuit QuickBooks Premier: Nonprofit Edition – 81%
- Sage Nonprofit Solutions – 12%
- Blackbaud Financial Edge & FundWare – 3.5%
- Others – 3.5%

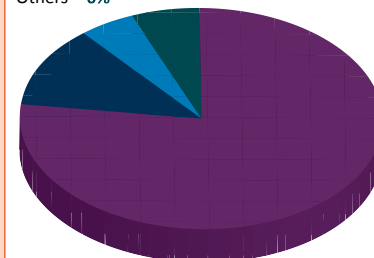


QuickBooks/ Small Business Paperless Add-Ons

1. SmartVault
2. Bill.com
3. Personable Inc.

CONSTRUCTION/CONTRACTOR ACCOUNTING

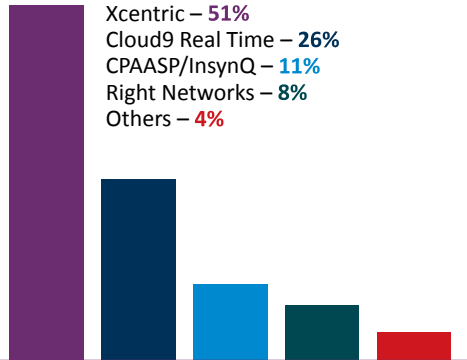
- Intuit QuickBooks Premier Construction Edition – 77%
- Sage Construction & Real Estate 50/100/300 – 12%
- Microsoft Dynamics – 5%
- Others – 6%



GENERAL BUSINESS TECHNOLOGIES

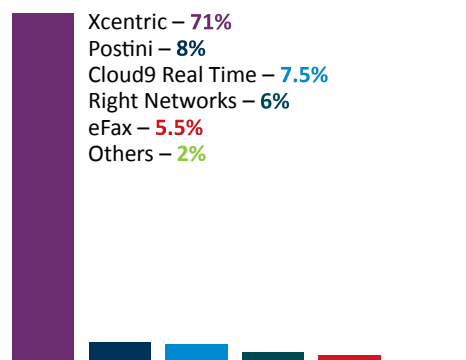
ASP/HOSTED SOLUTION PROVIDERS

Xcentric – 51%
 Cloud9 Real Time – 26%
 CPAASP/InsynQ – 11%
 Right Networks – 8%
 Others – 4%



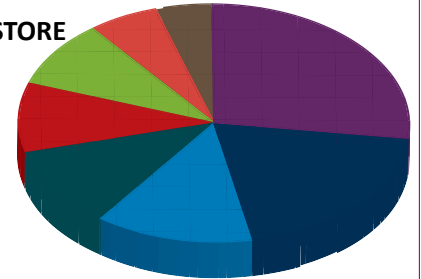
OUTSOURCED TECHNOLOGY SERVICES

Xcentric – 71%
 Postini – 8%
 Cloud9 Real Time – 7.5%
 Right Networks – 6%
 eFax – 5.5%
 Others – 2%



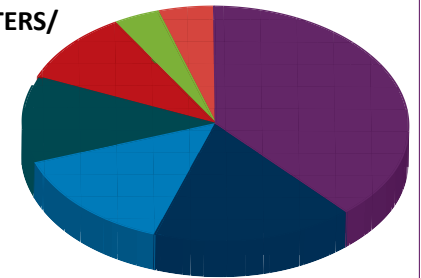
OFFICE SUPPLY STORE

Staples – 27%
 Office Depot – 20%
 Office Max – 13%
 Costco – 11%
 Sam's – 9.5%
 Quill – 9%
 BestBuy – 6%
 Others – 4.5%



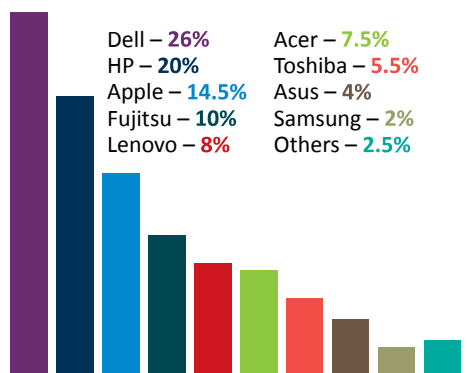
TABLET COMPUTERS/DEVICES

Apple iPad – 38.5%
 Asus – 17%
 Vizio – 14%
 Kindle/Fire – 12%
 Samsung – 10%
 Microsoft Surface – 4%
 Others – 4.5%



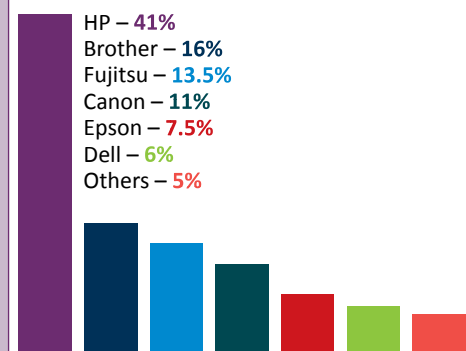
LAPTOP & DESKTOP COMPUTERS

Dell – 26%
 HP – 20%
 Apple – 14.5%
 Fujitsu – 10%
 Lenovo – 8%
 Acer – 7.5%
 Toshiba – 5.5%
 Asus – 4%
 Samsung – 2%
 Others – 2.5%



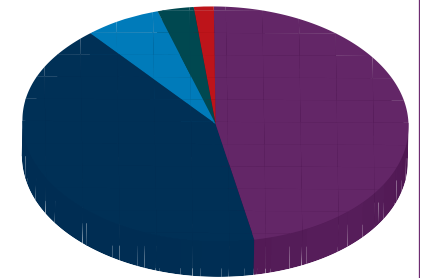
PRINTERS & SCANNERS

HP – 41%
 Brother – 16%
 Fujitsu – 13.5%
 Canon – 11%
 Epson – 7.5%
 Dell – 6%
 Others – 5%



SMARTPHONE

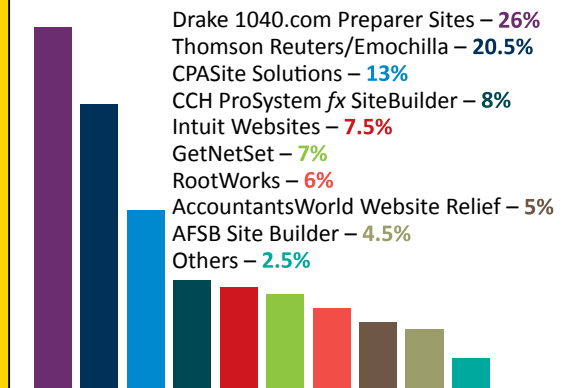
Apple – 47%
 Android – 42%
 Blackberry – 6.5%
 Windows – 3%
 Others – 1.5%



WORKFLOW MANAGEMENT SYSTEMS

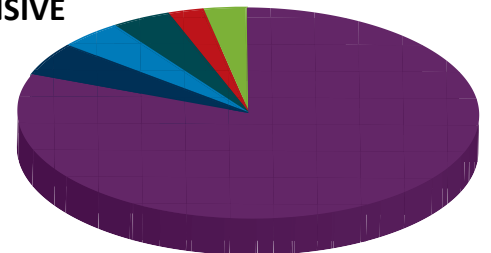
WEBSITE BUILDERS FOR ACCOUNTING FIRMS

Drake 1040.com Preparer Sites – 26%
 Thomson Reuters/Emochilla – 20.5%
 CPASite Solutions – 13%
 CCH ProSystem fx SiteBuilder – 8%
 Intuit Websites – 7.5%
 GetNetSet – 7%
 RootWorks – 6%
 AccountantsWorld Website Relief – 5%
 AFSB Site Builder – 4.5%
 Others – 2.5%



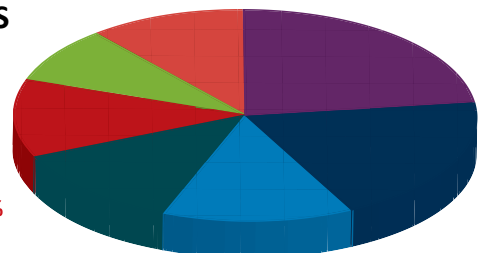
WORKFLOW COMPREHENSIVE END-TO-END

XCM Solutions – 81%
 MetaStorm – 5%
 Thomson Reuters FirmFlow – 4.5%
 CCH Axxess – 4%
 OfficeTools Pro – 2.5%
 Others – 3%



OTHER WORKFLOW TOOLS

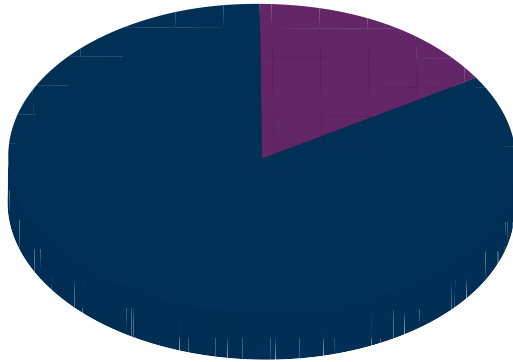
eFileCabinet – 23%
 Thomson Reuters Practice CS & GoFileRoom – 19.5%
 Esker FlyDoc – 13.5%
 CCH ProSystem fx Scan and fx Document – 12.5%
 Intuit Lacerte & ProSeries DMS – 12%
 Bill.com – 8.5%
 Others combined – 11%



NEW TECHNOLOGIES FOR PROFESSIONAL FIRMS

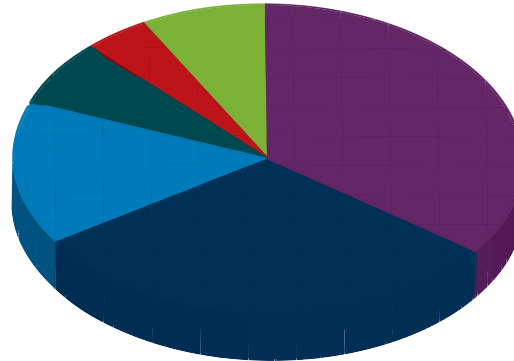
DO YOU USE SMARTPHONE OR TABLET APPS DESIGNED SPECIFICALLY FOR TAX AND ACCOUNTING PROFESSIONALS?

Yes – 16.29%
No – 83.71%



HOW MANY HOURS PER WEEK DO YOU WORK ON CLIENT ENGAGEMENTS OR FIRM BUSINESS WHILE AWAY FROM THE OFFICE (AT A CLIENT, AT HOME OR ANYWHERE ELSE)?

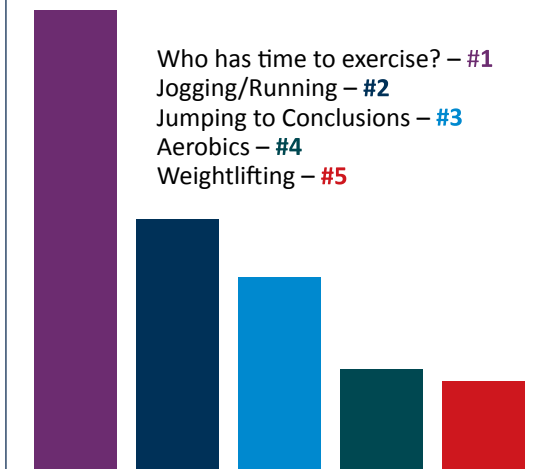
Less than 1 hour – 35% Between 9-12 hours – 7%
Between 1-4 hours – 31% Between 13-16 hours – 4%
Between 5-8 hours – 15% More than 17 hours – 8%



OUT-OF-OFFICE

EXERCISE PREFERENCE

Who has time to exercise? – #1
Jogging/Running – #2
Jumping to Conclusions – #3
Aerobics – #4
Weightlifting – #5



Technology is an integral part of the modern practice and the life of a tax or accounting professional, allowing greater productivity and helping many achieve a more balanced relationship between work and their personal life.

Thank you to the more than 4,000 voters who took the time to share their views in the 2014 Readers Choice Awards. As always, let us know if there are any additional programs or technologies you think would be a fit for the awards.

Here's to a successful year in 2014!

You can see more charts and results at
www.CPAPracticeAdvisor.com/11301326