

2024 SPECIAL REPORT



CPA

Practice **Advisor**

**2024 Readers' Choice Awards:
The Readers Have Voted!**

TABLE OF CONTENTS

INTRODUCTION	3
IN-FIRM TECHNOLOGIES	4
Federal/State Income Tax Preparation	4
Tax Planning Systems	5
Specialty Systems & Tax Prep Tools	5
Tax & Accounting Research Systems	6
Tax Document Automation	6
Sales & Use Tax Preparation	8
Sales & Use Tax Exemption Certificate Management	8
Accounting Write-Up Systems	8
Audit Engagement Tools	9
Business Valuation	9
Fixed Asset Management	9
Payroll	10
1099/W-2 Compliance	10
Time & Billing	10
Practice Management	11
Online Invoicing/Bill Payment Solutions	11
Client Portals	11
Document Management & Document Storage	12
Other Document Management Tools	12
Comprehensive Firm Workflow Systems	13
Other Workflow Tools	13
WEBSITE BUILDERS & SERVICES FOR ACCOUNTING FIRMS	14
FAVORITE CPE PROVIDER	14
HOW DO YOU PREFER TO EARN CPE?	14
WHICH CONFERENCES DO YOU ATTEND?	14
SMALL BUSINESS ACCOUNTING SYSTEMS	15
Small Business Accounting – <u>Installed</u> Programs	15
Online Small Business Accounting	15
Not-for-Profit Accounting	15
Expense & Travel Management Solution	15
Retail Accounting/Point-of-Sale Systems	15
REMOTE TECHNOLOGIES	16
ASP/Hosted Solution Providers	16
Outsourced Technology Services	16
GENERAL OFFICE TECH	16
OUT-OF-OFFICE	16
Favorite Form of Physical Exercise During Tax Season	16
How “Social” Are You?	17

THE READERS HAVE VOTED!

By Isaac O'Bannon, CPA Practice Advisor Managing Editor

The technologies used in professional accounting firms continue to evolve and shape how practices function, from client service, to staffing issues, and overall management and growth. With AI, automation, and other tools allowing professionals to be more productive than ever, which tools are essential for firm success as well as to offset talent pipeline issues?

At the same time, the nearly universal adoption of cloud-based accounting, payroll and management systems by businesses has made it easier for firms to work with clients in real time, providing rapid response to issues, as well as access to live data and account information.

CPA Practice Advisor's Readers' Choice Awards, now in their 20th year, give our readers the chance to spotlight the technologies they most respect and trust to provide client services, manage their firms, and help their clients run their businesses, from online programs for tax and accounting functions, to document automation and workflow management processes, as well as tools for collaboration, mobile productivity and office hardware.



CPA Practice Advisor's Readers' Choice Awards give our readers the chance to spotlight the technologies they most respect and trust to provide client services, manage their firms, and help their clients run their businesses.

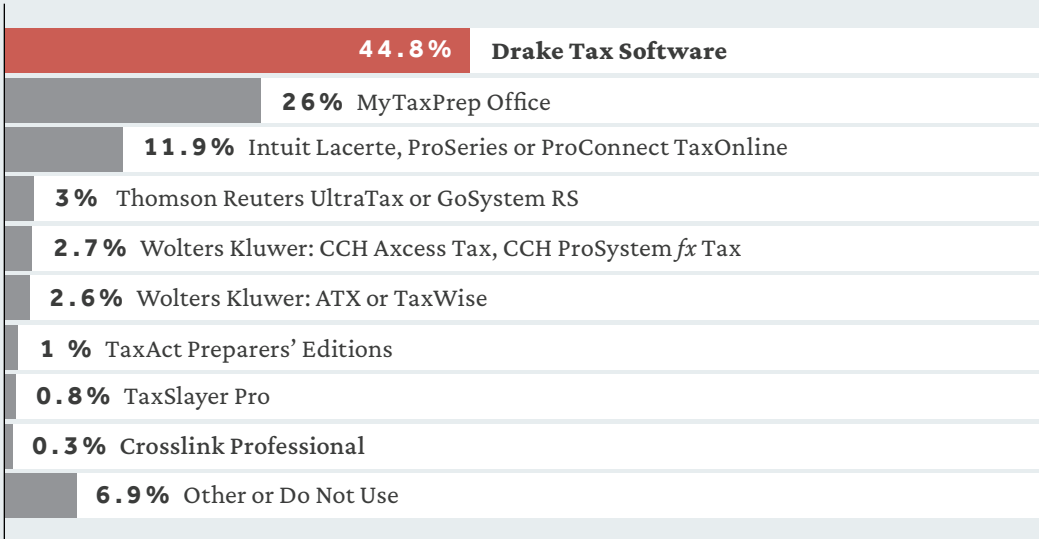
The awards also let professionals see the technologies and best workflow practices their peers are using, which can help them stay competitive in the constantly-evolving tax and accounting space. Thank you to the more than 5,500 readers who participated in voting this year. Now, on to the results!

IN-FIRM TECHNOLOGIES

FEDERAL/STATE INCOME TAX PREPARATION

Insight: As was true in every year of voting, the tax prep system category is always the most voted-on, with nearly all respondents selecting a preferred system. Also in keeping with recent years, Drake Software continues to inspire the users of its tax prep, planning, management and other systems to vote in high numbers. The result: Drake wins this category again this year, showing the loyalty many professionals have for this company’s tax systems.

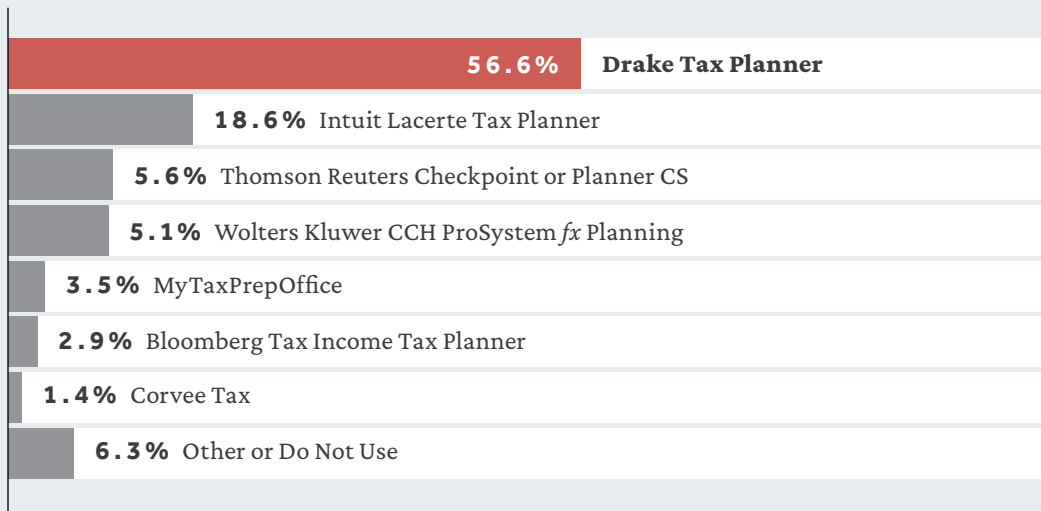
WINNER: Drake Tax Software (44.8%)



TAX PLANNING SYSTEMS

Insight: Major tax law changes seem to be an almost annual occurrence, which can make tax planning a challenge, especially for higher-net-worth clients, or those planning major life events. But even basic tax planning can make a big difference in reducing future tax liability. This makes having a reliable tax planning system that can look forward several years a valuable addition to a practice. Drake Software’s supporters turned out in full-force once again to cast their votes. Only about half of our 5,500+ voters reporting using a planning system, but of those who did, the voting results were:

WINNER: Drake Tax Planner (56.6%)



SPECIALTY SYSTEMS & TAX PREP TOOLS

Insight: Sometimes a professional tax preparation system still lacks a few specific functions, such as for niche industries, less common returns, or for certain firm workflow preferences. We call these tools that fill in the gaps or help increase your firm productivity “specialty systems.” This is another area where only about half of firms report using such a system. Of those who did, the votes were:

WINNER: QuickBooks Self-Employed (37.1%)

Runners Up:

- GruntWorx (24.7%)
- Canopy Tax Resolution Services (8.2%)
- CCH Axcess and ProSystem fx Products (Wolters Kluwer) (7.9%)
- SafeSend Returns (7.3%)
- Thomson Reuters UltraTax CS Source Document Processing (6%)
- MyTaxPrepOffice (3.5%)
- SurePrep 1040SCAN & TaxCaddy (2.7%)
- Taxfyle (2.1%)
- CFS Tax Tools (2%)
- TaxDome (1.5%)
- Other (11.9%)

Note: Respondents were able to choose more than one tool, thus the total in this category exceeds 100%.

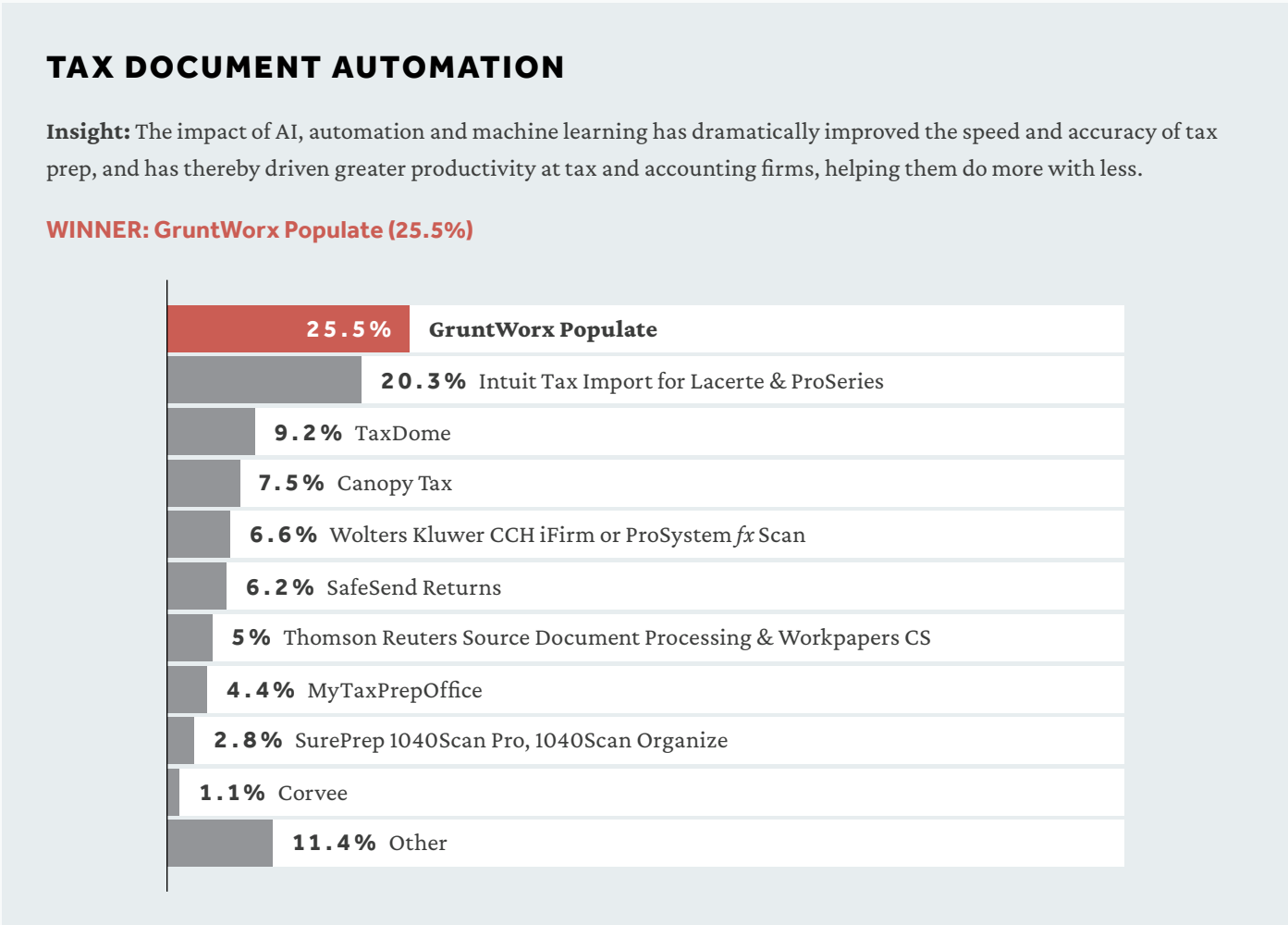
TAX & ACCOUNTING RESEARCH SYSTEMS

Insight: Professionals can't prepare taxes or help clients plan for future scenarios unless they know some tax code and strategies. Of course, nobody can know everything, so it's important to have access to comprehensive tax research tools. This includes primary source material such as the federal tax code and state tax laws, as well as tax court rulings and expert analysis of these materials. Some of the available tax research systems integrate with tax preparation programs, while others are used separately and can be used alongside any system. TheTaxBook once again handily won this category this year for its popular and inexpensive system. About 34% of our readers noted a preference in this category, and voters were allowed to vote for multiple products (and therefore, results total over 100%).

WINNER: TheTaxBook – Tax Materials Inc. (56.1%)

Runners Up:

- QuickFinder Tax Handbooks (15.4%)
- Intuit ProSeries/Lacerte Tax Research or ProLine (12.2%)
- Thomson Reuters Checkpoint (9.4%)
- CCH IntelliConnect or Accounting Research Manager (Wolters Kluwer) (7.8%)
- TaxSpeaker (5.8%)
- Parker Tax Pro Library (5.3%)
- Bloomberg Tax or Financial (4.7%)
- Tax Talk Today (3.5%)
- MyTaxPrepOffice (1.6%)
- Other (8.6%)



DON'T PANIC



Amanda Watson

Onboarding and
Retention Manager

Get award-winning tax software that won't leave you stranded.

Drake Software® puts tax preparation tools at your fingertips so you can manage the steady demands of your tax practice. Our approach is designed to support your success:

- Simple, value-driven pricing
- Purposeful onboarding
- Robust tax preparation workflow
- Smart integrations
- Convenient and reliable customer service

Explore Drake Software with a FREE Trial

Ever wondered what the inside of Drake Tax® actually looks like? Explore our feature-rich pro tax software for yourself with a free trial download!



DrakeSoftware®

Professional Tax Solutions

Toll-Free (866) 670-8478 | Free Trial [Info.DrakeSoftware.com/CPAPA-Trial](https://info.drakesoftware.com/CPAPA-Trial)

SALES & USE TAX PREPARATION

Insight: Since the Wayfair ruling in 2018, keeping up with the thousands of sales tax jurisdictions and rules across the U.S. has become a massive challenge for most small and mid-sized businesses. And following dire budget conditions during and following the pandemic, states have greatly increased their sales tax audit activity. This combination of factors means that it is more important than ever for businesses and their advisors to implement systems that can automate the application and filing of sales taxes across these jurisdictions, while also accounting for special taxation rules. About 39% of our 5,500+ voters cited use of such systems, but most of those (apx. 60%) say they rely on the sales tax functions within their accounting system, or report client sales via their state's website. Of those who chose a specialized system, which often includes much more detailed tax holidays and matrices, the following systems scored best. Voters were allowed to select more than one, so we are reporting the rankings only:

WINNER: Avalara AvaTax, Avalara Returns

Runners Up:

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

SALES & USE TAX EXEMPTION CERTIFICATE MANAGEMENT

Insight: One of the most easily scrutinized areas by sales tax auditors is exemption certificates, which are often poorly managed by businesses. Although most firms in our survey did not express a preference or personal use with these products, those who did voted as follows:

WINNER: Thomson Reuters ONESOURCE (38.8%)

Runners Up:

- Avalara CertCapture (23.6%)
- Vertex Inc. Exemption Certificate Manager (9.9%)
- MyTaxPrepOffice (6%)
- Sovos Tax Solutions (5.8%)
- Other (15.9%)

ACCOUNTING WRITE-UP SYSTEMS

Insight: The widespread adoption of online business accounting systems has fundamentally changed the write-up process, but the basics are still the same: Periodically reconciling a business' bookkeeping to ensure accuracy. About half of our 5,500+ survey respondents reported use of one of the systems noted below.

WINNER: Intuit QuickBooks Accountant (33.4%)

Runners Up:

- Drake Accounting (12.6%)
- Thomson Reuters Accounting CS (12.6%)
- Xero (2.1%)
- Sage Intacct or Sage One (1.9%)
- Client Accounting Suite (Wolters Kluwer) (2.4%)
- AccountantsWorld by IRIS Accounting Power (1.2%)

Others receiving less than 1%:

- Client Accounting Suite (Wolters Kluwer)
- AccountingSuite
- PC Software Accounting Inc.
- CYMA Systems
- Visual Bookkeeper
- LeaseCrunch
- UBCC Real Time Accounting

AUDIT ENGAGEMENT TOOLS

Insight: Automation, AI and machine learning technologies have also greatly streamlined audit engagements, which used to take weeks or months of on-site visits, but now are much faster, and offer greater controls and accuracy.

WINNER: AuditFile (27.7%)

Runners Up:

- CCH ProSystem fx Knowledge Coach, CCH ProSystem fx Engagement, CCH Accounting Research Manager or CCH Audit Accelerator (16.7%)
- Thomson Reuters: Workpapers CS, AdvanceFlow or Checkpoint SMART Audit Suite (14.4%)
- CaseWare IDEA (9.4%)
- Suralink (8%)
- Audit Confirmations (6.1%)
- Audit Dashboard Automated PBC (4.9%)
- MyTaxPrepOffice (3.2%)
- Other (12.8%)

Others receiving less than 3%:

- Confirmation.com
- Capital Confirmation
- Teammate Analytics
- OnPoint PCR
- Wiley Advantage Audit
- Rivio Clearinghouse

FIXED ASSET MANAGEMENT

WINNER: Intuit ProSeries Fixed Asset Manager (28.8%)

Runners Up:

- Thomson Reuters Fixed Assets CS (23.2%)
- CCH Fixed Assets Manager or CCH ProSystem fx Fixed Assets (11.1%)
- Sage FAS Asset Accounting (8.7%)
- Pro-Ware Asset Keeper (4.3%)
- Bloomberg Tax Fixed Assets (3.9%)
- MyTaxPrepOffice (2%)
- Other (13.3%)

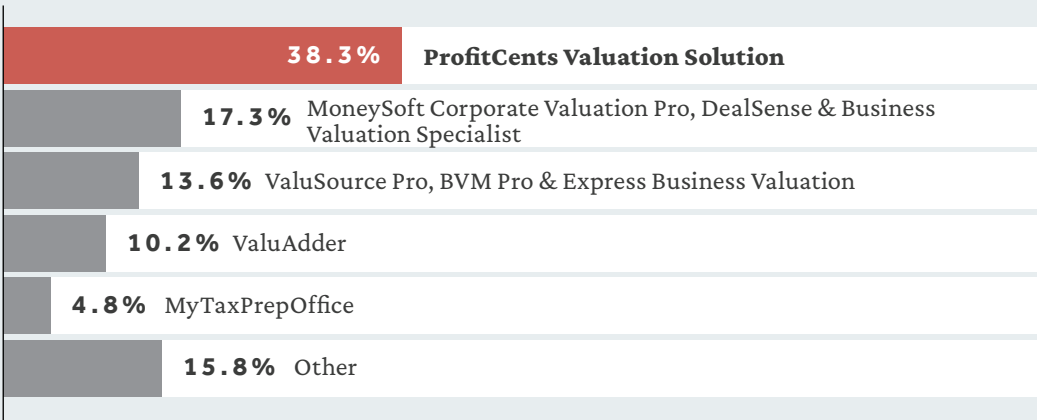
Others receiving less than 2%:

- MultiView Asset Management
- Open Systems
- Real Asset Management Inc.
- Wasp Barcode Technologies

BUSINESS VALUATION

Insight: Accounting and tax professionals involved in business transfers, divorce litigation and family wealth planning often find a need for assessing the value of a business entity. This is one of the smaller niche specialties among firms, with about 10% of our voters reporting a preference in this category.

WINNER: ProfitCents Valuation Solution (38.3%)



PAYROLL

Insight: The cloud and automation revolutions have greatly altered the role accountants play regarding payroll services for their clients. What once could be a tedious process is now mostly a matter of review of automated pre-run reports, ensuring accuracy of the runs and performing periodic reconciliations. Almost everything else is, or can be, automated. This also provides for greater employer and employee self-control and anytime access. There are several dozen (or more) products on the market, but for our rankings, we will only report those that received at least 1% of the votes.

WINNER: Intuit QuickBooks Payroll Systems (27.2%)

Runners Up:

- Drake Accounting (13.8%)
- ADP Payroll Solutions (13.7%)
- Gusto Payroll (13.1%)
- Paychex (6%)
- Sage 50 (2.3%)
- AccountantsWorld by IRIS Payroll Relief (2.2%)
- Thomson Reuters Accounting CS Payroll or myPay (2%)
- AMS 1099-Etc Payroll (1.6%)
- SurePayroll (1.5%)
- CFS (1.4%)
- Patriot Software (1.2%)
- Real Business Solutions Payroll Mate (1%)
- Other (13%)

1099/W-2 COMPLIANCE

Insight: Year-end payroll and contractor compliance systems that prepare W-2 and 1099 forms and can automatically file them can help relieve much of the burden of processing hundreds or thousands of forms for your clients each year. Some systems also help streamline the entire process, including mailing of copies to recipients. Due to the large number of products in this space, only those receiving 2% or more of the votes are listed.

WINNER: Drake Accounting (22.9%)

Runners Up:

- eFile4Biz (9.1%)
- Track 1099 (7.7%)
- Intuit QuickBooks (5%)
- 1099 Pro (4.6%)
- Tax1099 (3.3%)
- AMS 1099-Etc (3.3%)
- Greatland Yearli (3.2%)
- Thomson Reuters Accounting CS Payroll Compliance (3.2%)
- CFS (3.1%)
- MyTaxPrepOffice (2.8%)
- W2/1099 by Wolters Kluwer (2.8%)
- EagleView Filing Solutions (2.3%)
- W2 Mate by Real Business Solutions (2.1%)
- Other (23.7%)

TIME & BILLING

Insight: Managing time for firm staff and projects is critical for firm efficiency, with the end product of invoicing helping ensure steady revenue flow. Effective time management is essential even now that most firms have ditched time-based billing.

WINNER: QuickBooks Time (39.1%)

Runners Up:

- TaxDome (10.2%)
- BILL (9.5%)
- Sage Timeslips (5.5%)
- Canopy Practice Management (4.7%)
- TPS Software (3.5%)
- CPACheck by AffiniPay (3.4%)
- AccountantsWorld by IRIS Practice Relief (2.9%)
- OfficeTools (2.2%)
- Other (19%)



PRACTICE MANAGEMENT

Insight: *CPA Practice Advisor* defines practice management tools as those with more extensive functions for managing firm productivity and workflow management, automation of tasks, and record maintenance. Products that received at least 1% of votes included:

WINNER: OfficeTools (18.1%)

Runners Up:

- CCH Axcess Practice, CCH iFirm Practice Manager, CCH ProSystemfx (10.6%)
- Thomson Reuters Practice CS (10.5%)
- Canopy Tax Practice Management (10.1%)
- Karbon Workflow Management (5.3%)
- TaxDome (4.3%)
- Financial Cents (4.1%)
- ClientWhys/TaxBuzz.com (3.7%)
- TaxWorkFlow (3%)
- XCM Workflow (2%)
- Mango Practice Management (1.4%)
- Abak Time and Billing (1.3%)
- Other (10.1%)



ONLINE INVOICING/BILL PAYMENT SOLUTIONS

Insight: Cloud-based, integrated invoicing tools can help firms improve AR functions and cashflow, while bill payment systems can help streamline AP. Voters were allowed to select multiple products, resulting in more than 100% total. Products receiving at least 1% shown.

WINNER: Intuit Payments (42.4%)

Runners Up:

- PayPal (13.5%)
- BILL (9.1%)
- TaxDome (7.2%)
- CPACHarge by Affinipay (7%)
- Bill & Pay (4.6%)
- Invoiced (4.2%)
- Xero (3.7%)
- Square (2.7%)
- OfficeTools (2.5%)
- Sage Payments (2.5%)
- Zoho Books (1.7%)
- FreshBooks (1.3%)
- Dext (*formerly ReceiptBank*) (1.2%)
- Other (15.6%)

CLIENT PORTALS

Insight: Client portals make sharing data with clients easier, and make it easier for them to submit documents to the firm, and retrieve documents when needed. Products receiving at least 2% of the votes included:

WINNER: Drake Software Drake Portals (38.7%)

Runners Up:

- DropBox (9.4%)
- TaxDome (8.1%)
- Citrix ShareFile (5.3%)
- Canopy (3.4%)
- Verifyle (3.1%)
- CCH Axcess Portal/CCH ProSystemfx Portal/CCH iFirm or XCM Solutions (3%)
- SmartVault (2.7%)
- MyTaxPrep Office (2.3%)
- CPASiteSolutions (2%)
- Other (22%)

DOCUMENT MANAGEMENT & DOCUMENT STORAGE

Insight: This category includes a wide range of solutions, with functions ranging from basic file folders to advanced options that include client collaboration tools, automatic archiving, retention functions and multi-worker productivity features. Products receiving 1% or more of the voting included:

WINNER: Drake Document Manager (50.3%)

Runners Up:

- Intuit ProSeries & Lacerte DMS (7.7%)
- Thomson Reuters FileCabinet CS/GoFileRoom (4.2%)
- CCH Axcess Document or CCH ProSystem fx Document (3.9%)
- SmartVault Document Storage (3.3%)
- eFileCabinet (2.1%)
- TaxDome (1.8%)
- MyTaxPrepOffice (1.7%)
- Suralink (1.6%)
- AccountantsWorld by IRIS Cloud Cabinet (1.3%)
- Other (15.6%)

OTHER DOCUMENT MANAGEMENT TOOLS

Insight: Document management also requires special tools that sometimes work with the scanner or work with the document management system directly for functions including OCR. Voters were allowed to select more than one, so totals exceed 100%.

WINNER: Fujitsu (35.5%)

Runners Up:

- HP (28.5%)
- Canon (14.1%)
- SafeSend TicTie Calculate (11.8%)
- Nuance (5%)
- Kofax (4.9%)
- ABBYY (4.8%)
- Other (14.7%)

Voted #1
TAX RESEARCH PRODUCT!
12 YEARS IN A ROW

CPA
Practice Advisor

READERS' CHOICE AWARDS | 2024

TTB THE TAX BOOK

Award-winning tax research solutions
for time-crunched tax professionals.

TheTaxBook

WebLibrary

THE TAX BOOK

WEB LIBRARY

TheTaxBook delivers real answers, real fast! Save time, guaranteed.
We compile the mountains of tax information, condense it for quick comprehension, and present it in a fast-answer format.

Use the #1 tax research product on the market!

thetaxbook.com | 866-919-5277

CPA Practice Advisor
READERS' CHOICE AWARDS 2024

CPA Practice Advisor
READERS' CHOICE AWARDS 2023

CPA Practice Advisor
READERS' CHOICE AWARDS 2022

CPA Practice Advisor
READERS' CHOICE AWARDS 2021

CPA Practice Advisor
READERS' CHOICE AWARDS 2020

CPA Practice Advisor
READERS' CHOICE AWARDS 2019

CPA Practice Advisor
READERS' CHOICE AWARDS 2018

CPA Practice Advisor
READERS' CHOICE AWARDS 2017

CPA Practice Advisor
READERS' CHOICE AWARDS 2016

CPA Practice Advisor
READERS' CHOICE AWARDS 2015

CPA Practice Advisor
READERS' CHOICE AWARDS 2014

CPA Practice Advisor
READERS' CHOICE AWARDS 2013

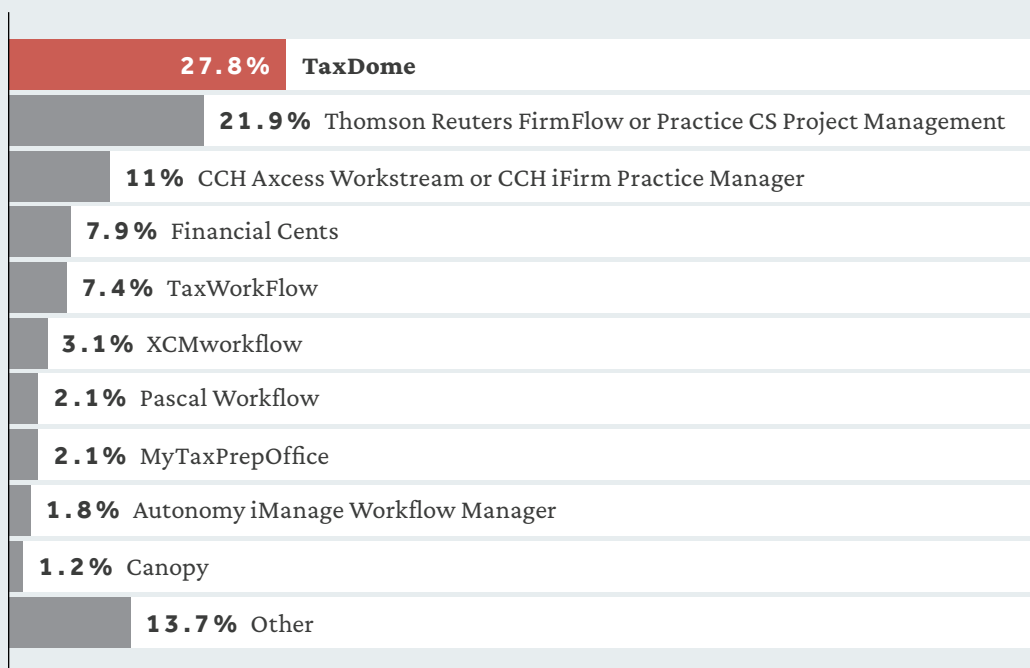
CPA Practice Advisor

12

COMPREHENSIVE FIRM WORKFLOW SYSTEMS

Insight: We divide Workflow into two categories: Comprehensive Workflow and Other Workflow Tools, which are designed for aiding in specific tasks and engagements, and for smaller firms.

WINNER: TaxDome (27.8%)



OTHER WORKFLOW TOOLS

Voters were allowed to select more than one, so totals exceed 100%.

WINNER: GruntWorx (24.7%)

Runners Up:

- TaxDome (13.3%)
- Intuit Tax Import or DMS for Lacerte and ProSeries (12.6%)
- BILL (8.6%)
- Canopy (8.4%)
- OfficeTools WorkSpace (8.3%)
- Citrix ShareFile for Accountants (6.4%)
- Various CCH ProSystem fx Systems (6%)
- Thomson Reuters GoFileRoom/Practice CS/Workpapers CS (5.5%)
- eFileCabinet (3.7%)
- SmartVault (3.6%)
- Suralink (3.3%)
- Expensify (3%)
- Audit Dashboard (2.4%)
- Doc.IT by IRIS (2.2%)
- SurePrep (1.8%)
- Karbon Workflow Management (1.2%)
- MyTaxPrepOffice (1%)
- Cabinet NG (1%)
- Tallie (0.3%)
- Other (7.9%)

WEBSITE BUILDERS & SERVICES FOR ACCOUNTING FIRMS

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

WINNER: Drake Software SiteDart Website Services (24.8%)

Runners Up:

- GetNetSet (15.7%)
- CPA Site Solutions (10.1%)

- CCH SiteBuilder (4.9%)
- CPASites.com (4.6%)
- AccountantsWorld by IRIS Website Relief (3.9%)
- Build Your Firm (3.4%)
- GoDaddy (3.1%)
- CountingWorks/ClientWhys/TaxBuzz (3%)
- Thomson Reuters Web Builder CS (3%)
- Wix (3%)
- Tenenz AFSB or Integer (2.6%)
- TaxDome (1.6%)
- Network Management Group (NMG) WebCare (1%)
- Other (15.3%)

FAVORITE CPE PROVIDER

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

WINNER: Drake CPE (17.5%)

Runners Up:

- CPAAcademy.org (12.1%)
- *CPA Practice Advisor* (8.5%)
- AICPA (6.7%)
- State CPA Societies (6.4%)
- MyCPEwebinars (4.9%)
- Surgent CPE (4.3%)
- NATP (3.3%)
- TaxSpeaker (2.3%)
- Western CPE (2.1%)
- Becker CPE (2%)
- Canopy Tax CPE (1.6%)
- Earmark CPE (1.5%)
- TheTaxBook (1.5%)
- IRS (1.2%)
- Sequoia (1.1%)
- Other (23%)

HOW DO YOU PREFER TO EARN CPE?

WINNER: Live Online Classes/Webcasts (41%)

Runners Up:

- Self-Study with Tests (30%)
- In-Person Seminars/Workshops (25.9%)
- Other (3.1%)

WHICH CONFERENCES DO YOU ATTEND?

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

WINNER: IRS National Tax Forum (21.2%)

Runners Up:

- QuickBooks Connect (12.4%)
- AICPA ENGAGE Las Vegas (8.4%)
- *CPA Practice Advisor's* Ensuring Success (3.5%)
- Digital CPA (3.4%)
- NATP (3.1%)
- NAEA National Conference (3%)
- CCH Connections (2.7%)
- Thomson Reuters Synergy (2.4%)
- FICPA (1.6%)
- Other (38.3%)

SMALL BUSINESS ACCOUNTING – INSTALLED PROGRAMS

WINNER: Intuit QuickBooks Desktop (83.7%)

Runners Up:

- PC Software Accounting Inc. (2.7%)
- Sage One, Sage 50 or Sage ERP (1.3%)
- A-Systems Visual Bookkeeper (1.2%)
- CheckMark Software MultiLedger (1%)
- Other (10.1%)

ONLINE SMALL BUSINESS ACCOUNTING

WINNER: Intuit QuickBooks Online/Online Accountant (74.3%)

Runners Up:

- Xero (4.9%)
- Sage Intacct or Business Cloud (2.6%)
- Thomson Reuters OnBalance, Client CS, CS Client Access (2.2%)
- AccountantsWorld by IRIS Accounting Power (2%)
- FreshBooks (1.8%)
- Wave – By H&R Block (1.7%)
- NetSuite (1.3%)
- Zoho Books (1%)
- Other (8.2%)

NOT-FOR-PROFIT ACCOUNTING

Intuit QuickBooks Premier Nonprofit (64.4%)

Runners Up:

- Sage Intacct (6%)
- Aplos (4%)
- Blackbaud Financial Edge or Fundware (2.9%)
- CYMA Systems (2.2%)
- Cougar Mountain FUND Suite (1.6%)
- Abila MIP (1.5%)
- OneNFP (1.5%)
- Fund E-Z (1.4%)
- Open Systems TRAVERSE (1.4%)
- AccuFund (1.2%)
- GMS Software (1%)
- Other (10.9%)

EXPENSE & TRAVEL MANAGEMENT SOLUTION

WINNER: Expensify (18.6%)

Runners Up:

- Concur Expense (12.4%)
- Categorize Me (11.6%)
- Zoho Expense (7.5%)
- Certify (5.4%)
- Dext (formerly Receipt Bank) (5%)
- Chrome River (3.7%)
- Xpenditure (3.5%)
- ExpenseWatch (2.9%)
- ExpensAble (2.2%)
- CorPay (2.1%)
- SutiExpense (2.1%)
- Tallie (2.1%)
- SpringAhead (1.3%)
- Other (19.6%)

RETAIL ACCOUNTING/ POINT-OF-SALE SYSTEMS

WINNER: Square (43.6%)

Runners Up:

- Intuit QuickBooks POS (32.5%)
- NetSuite OnSite POS (1.8%)
- Database Creations (1.7%)
- AddSum (1.6%)
- Cougar Mountain Denali POS (1.6%)
- AccuPOS (1.2%)
- Other (16%)



REMOTE TECHNOLOGIES

ASP/HOSTED SOLUTION PROVIDERS

Drake Hosted by Rightworks (33.4%)

Runners Up:

- Rightworks (18.6%)
- Cetrom CPA Cloud (9.8%)
- Thomson Reuters Virtual Office CS/SaaS (8.5%)
- Ace Cloud Hosting (7%)
- CPAASP/InsynQ (2.1%)
- Network Alliance (1.9%)
- Network Management Group Inc. (NMGI) (1.8%)
- Private Cloud and Cloudnine Realtime by CARET (1.5%)
- LeaseCrunch (1.5%)
- Other (13.9%)

OUTSOURCED TECHNOLOGY SERVICES

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

WINNER: Rightworks (35.3%)

Runners Up:

- Ace Cloud Hosting (18.3%)
- Cetrom (14%)
- CPA2Biz Email Solutions (5.2%)
- Network Management Group Inc. (NMGI) (4.2%)
- AppRiver (3.7%)
- CollBox (2.8%)
- Cloudnine Realtime by CARET (2.5%)
- InsynQ/CPAASP (2.3%)
- Other (15.1%)

GENERAL OFFICE TECH

PRINTERS & SCANNERS

More than one selection was allowed.

- HP (53.8%)
- Brother (38.7%)
- Canon (19.1%)
- Epson (14.9%)
- Fujitsu (13.4%)
- Dell (6.4%)
- Xerox (4.2%)

OUT-OF-OFFICE

FAVORITE FORM OF PHYSICAL EXERCISE DURING TAX SEASON

More than one selection was allowed.

WINNER: "Who has time to exercise?" (42%)

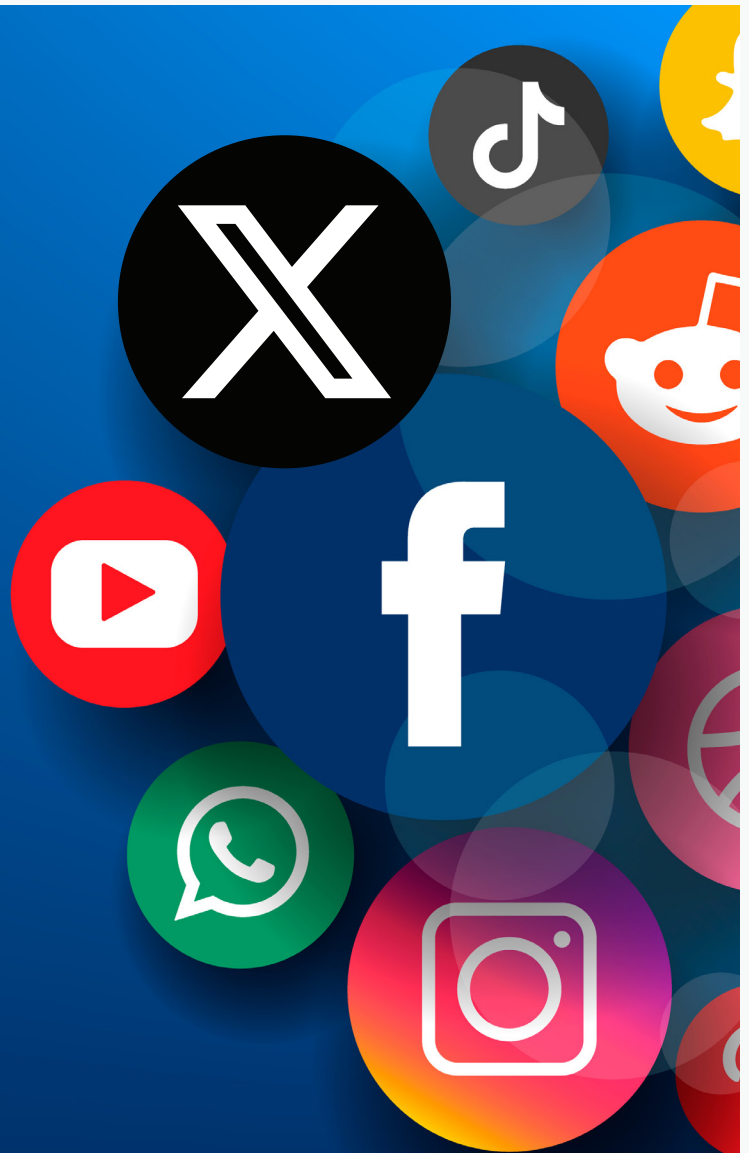
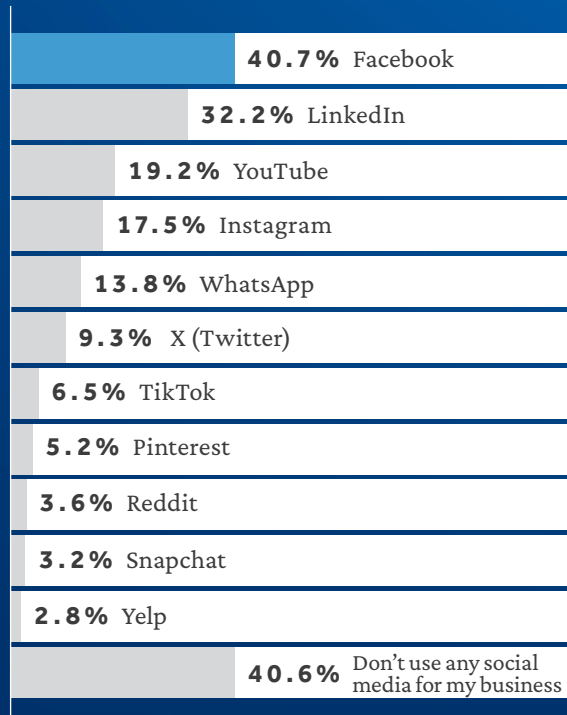
Runners Up:

- Jumping to Conclusions (12.4%)
- Walking (12.1%)
- Jogging/Running (10.6%)
- Weightlifting (10.3%)
- Bicycling (9.7%)
- Yoga (9.3%)
- Aerobics (6.2%)
- Team Sports (3.3%)
- Racket Sports (2.4%)



HOW “SOCIAL” ARE YOU? WHICH SOCIAL MEDIA TOOLS DO YOU USE IN CONJUNCTION WITH YOUR WORK?

About 40% of our voters said they don’t use any social media tools for business purposes. Multiple responses were allowed, so this totals to more than 100%.



About 40% of our voters said they don’t use any social media tools for business purposes.

CPA Practice **Advisor**

Thank you to the more than 5,500 tax and
accounting professionals who participated
in the 2024 Readers' Choice Awards.