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Helping Small Business Clients Work Smarter

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When it comes to a small business' financials, there's little doubt to whom most go for advice: their public accountant. And they often turn to this same person when making decisions about software and other technology tools. After all, their accountant is frequently a small business owner, too. Plus, the tax and accounting professional's expertise through business consulting services leads these small business owners and managers to assume their accountant will know exactly what they need in order to be more productive.

That's a major challenge when it comes to technology. You can't very well keep up on all of the technology trends and advances in every one of the niche industries your clients serve and also expect to run your practice and have anything resembling a personal and family life. The same, however, is true for your small business clients: They are probably pretty busy doing what they (hopefully) love and are (hopefully) good at. Which likely doesn't include searching high and low for technology tools that can aid in their productivity and save them time that could be better put to use on other work issues or away from the office.

Fortunately, for both you and your clients, that's where we can provide some assistance. We routinely do this through our reviews of programs "For Your Clients," as well as in our columns and feature articles. But even then, we focus primarily on common vertical small business industries and tasks. There are many other technology tools on the market, however, that can also offer benefit to virtually any type of small business. They come in various forms and are intended for a wide range of functions, from printing and document management, to desktop gadgets, mobile tech devices, web-based systems for invoicing and collaboration portals, to name a few.

Hundreds of such products are out there, so this article's purpose is to provide an overview of a few that are either fairly new to the market or that you just may not have encountered yet. Remember, whether for your client or your own practice, saving even just a few minutes per day can add up fast, allowing you to be more productive, or perhaps even bring a little more equity back to your work/life balance.

Endicia Internet Postage

www.endicia.com

The tax and accounting profession might be making progress in the movement toward a paperless office, but business in general is nowhere near the same adoption rate. Likewise, while technology is bringing greater and greater online document sharing capabilities, there will likely be a need for mail and shipping long into the future. Whether a small business is a retailer or manufacturer needing to ship a product across the United States, a services company mailing invoices, or a legal firm overnighting signed contracts, the need is obvious, since you definitely can't digitize a new pair of shoes or a handmade clock.

While businesses have long used postal meters to print postage in the office, there's another alternative: Endicia's web-based postage and shipping system, which lets users buy and print postage for letters and packages from one ounce up to 70 pounds. The company offers several service plans, including one with no monthly fee or commitment, which can accommodate businesses with less need for postage, or allow them to try out the system before signing up for a more comprehensive plan.

Endicia works on PCs and Macs, and unlike a cumbersome postal meter, lets users print USPS postage and shipping labels from their desk on DYMO and other label printers. It also includes a feature that verifies addresses and offers discounted delivery confirmation and insurance. Several reports further benefit the business, helping to better track and manage postal expenses, along with the ability to assign cost codes and send email notifications with any mail item.

Potential Benefits: Regular postal meters just can't compare to Endicia's features, which include reporting tools, mobile access to postage printing, discounted insurance and delivery confirmation, and integration with Outlook and ACT!

PrintBoss from Wellspring Software

www.wellspringsoftware.com

Almost all professional accounting and payroll systems allow accountants to print paper to blank stock, but for many small businesses this feature just hasn't been easily available. Wellspring Software offers a simplified system called PrintBoss for using one blank check stock for however many small businesses, banks and accounts an entrepreneur maintains. This rids them of the need to change the check stock in the printer and eliminates the need to sign checks, while also enabling them to buy the blank check stock in cheaper bulk.

PrintBoss is available in three versions: the standard PrintBoss, PrintBoss Express and PrintBoss Enterprise, with each offering MICR printing functions that can integrate with any small business accounting system. This allows users to print directly from that program onto checks that include security features such as a VOID pantograph, watermarks, rainbow backgrounds and toner grip paper. Other features include the ability to create PDF copies of any document, print deposit slips, print duplicate miniature copies, print digital, security-protected signatures, generate positive pay files according to bank specs and include logos on checks. Wellspring also offers this stock paper through its website, with various size and format options, Canadian-compliant checks, envelopes, and MICR toner.

Potential Benefits: Many entrepreneurs manage multiple small entities with separate banks, accounts, graphic logos and other check needs. Wellspring's system makes it easier to print checks from any of these companies and accounts without having to change check stock, as well as providing industry-standard security features. It can also integrate with any existing email systems.

SecureTide from AppRiver

www.appriver.com

Tired of spam? Worried about your staff accidentally opening an email with a virus that could potentially damage your computers and network, and even expose client data? Unfortunately, our technology-reliant world makes these legitimate concerns, but you can be more proactive in your battle to keep dangerous spam at bay.

AppRiver offers several email protection options from SecureTide, which prevents unwanted email from even reaching a business' email servers and scans every email for viruses, giving small businesses the same level of protection as Fortune 500 companies. The vendor also offers secure email hosting and a web protection service that lets businesses create their own employee Internet usage policy.

Another great solution they offer is SecureMail, which encrypts email and mobile messaging, helping keep internal and client communications secure from prying eyes, while also offering compliance with data security regulations. All

of AppRiver's programs and services provide centralized management controls and reporting tools, allowing users to maintain better control over their communications security.

Potential Benefits: Extra protection against viruses and the ability to virtually eliminate spam is something anybody can appreciate, especially those whose time is a limited resource.

Method from Allocet

www.methodintegration.com

Every small business has different clients, different staff, different vendors, different workflow processes, different capabilities and different expectations, and since there isn't an accounting system that can possibly be exactly what each of them needs, most of them learn to use QuickBooks. This is usually a good thing, but as all accountants know, QuickBooks users always find a way of doing things they shouldn't, whether on accident or on purpose.

Well, Method can help solve at least some of these issues. Essentially, Method is a highly customizable web-based shell that fits over a business' regular or online version of QuickBooks. The accountant can specify the exact functions and features that each individual user can access and use. Business users log into the system into portals designed specifically for their needs and business type. The accountant is also provided with a login, which gives full access to the client's complete data in real time.

While QuickBooks is available in versions for various large industry types, Method takes the customizability of the QuickBooks experience a lot further, with very specific versions tailored for more than two dozen business types, including real estate, landscape contractors, software businesses, studios, field services, property management, automotive, retail, non-profit, wholesale, construction and education. And more are on the way.

Potential Benefits: QuickBooks is a good tool, but it has grown more complex over the past years as Intuit made it much more functional. Method makes using the core of the QuickBooks program easy again by offering a simple and highly customizable interface. The system also gives greater user-level control and provides accountants with direct access to a client's live QuickBooks data.

Smart Apps from InfoStreet

www.infostreet.com

Small businesses use a variety of technologies every day, but this usually consists of a hodgepodge collection for different tasks, coming from different vendors and with no integration capabilities. Such technologies can include individual and group calendaring functions, file sharing, mailing lists, portals, website development, CRM, email and a host of other things. There is a better solution, though. And Info Street has an "app" for it.

The collection of Smart Apps from InfoStreet includes applications for all of these functions and more, with the added benefits of integration between components that helps reduce common redundancies. Small businesses can choose individual programs or the entire suite. Other Smart Apps include email and email archiving, an address book, and an easy-to-set-up knowledgebase that a business can use to reduce time spent answering common questions from customers. All of InfoStreet's Smart Apps are web-based, allowing anytime/anywhere access to the programs and data, and easing the IT burdens on small businesses.

Potential Benefits: Using programs that integrate with each other for these varied tasks can aid productivity, and because they are web-based, business users with multiple locations or who frequently travel can access them from anywhere.

Zip Notes

www.zipnotes.com

We've mentioned Zip Notes before, and the unique, roll-based system still offers a convenient alternative to traditional sticky pads, which are often too small for some purposes. Zip Notes let the user decide how long the sticky will be, since it uses a continuous roll that is housed in a battery-powered tape dispenser-style housing. The company also offers a manual dispenser model.

Need a short note? Push the button. Need a longer note? Keep pushing the button. The roll of sticky paper is 150 feet long, so there's plenty to go around, and no need to buy multiple sizes of sticky pads at the office store. Another unique feature is that the pads have the adhesive in a strip down the middle, which helps prevent notes from curling. The rolls are available in yellow, blue and pink.

Potential Benefits: Any length sticky notes eliminates the need for multiple pad sizes, plus no curling.

Visual Staff Scheduler Pro from ABS

www.abs-usa.com

In offices with multiple professional staff, like accounting firms, tax offices, lawyers and the like, time is a crucial element, but managing that time has always been a challenge. This is especially so for offices where an administrator oversees scheduling for the other staff.

Visual Staff Scheduler Pro may be the solution, making it easier to manage the calendars for multiple staff and resources, helping to eliminate scheduling conflicts, and providing overviews of multiple calendars simultaneously, which can aid in determining staff availability. For other small business types, it can also be used to assign shifts, apply shift rotations, manage real-time schedule changes and reduce overtime.

VSS Pro makes it easy to handle these tasks, as well as tracking time off and staff skill sets, with the ability to easily email calendars, reports and schedules. VSS Pro is available in industry-specific versions for professional service firms, healthcare, government, retail, hospitality, transportation and manufacturing and distribution businesses.

Potential Benefits: Simplifying scheduling and being able to easily look up staff availability would be great for any practice, and the system's schedule functions offer good features for your small business clients who manage hourly-based workers with flexible shifts.

Bill.com

www.bill.com

We cheered when Bill.com was introduced a couple of years ago, because it brought easy-to-use AP to the small business level. The web-based system automates virtually the whole process of paying vendors, relieving small business owners and managers of these tedious tasks and eliminating postage costs and hassles.

Users simply fax or scan and send a copy of an invoice or bill to Bill.com, then enter the item into the online payment system. Basic vendor information like address, contact, TIN, account, class and other information is entered only once, and then automatically populated when paying the same vendor on future invoices. The system then sends an email to the "approving level" person at the business and, when approved, Bill.com handles the rest, sending out payment to the vendor by the net due date on the invoice. No need to sign the checks, keep up with check stubs or fuss with envelopes and postage.

And it goes a step further in reducing AP headaches by integrating with QuickBooks and automatically downloading invoice, payment, account and other data directly into the accounting system.

Potential Benefits: No more stacks of invoices cluttering up your desk or accidentally being forgotten and incurring

late fees, plus automatic posting of the payments through integration with QuickBooks.

Nelson Email Organizer (NEO) from Caelo

www.caelo.com

There may be dozens of ways we communicate with each other in the modern world: from IM, text and Twitter [<http://www.twitter.com>], to actual phone calls and, gasp, even mail occasionally. But the biggest revolution in professional communications in the past 20 years has certainly been email. And Microsoft's Outlook has been the de facto ruler of this messaging genre for most of this time.

Unfortunately, the core components of email programs, including Outlook, were mostly designed in the halcyon days of the late 20th century when we only received a few dozen messages per day. As email traffic and spam picked up, Outlook and other programs added a hodgepodge of features that let people create new folders and routing rules, but as the volume of incoming and outgoing mail became a tidal wave, these hastily added remedies became burdensome to manage.

The Nelson Email Organizer (NEO) acts as an add-in to Outlook, allowing users to still access all of that programs feature set, but also providing much greater organization options, super-fast search capabilities, unified message views, tabbed sorting, mail staging areas, automatic detection of bulk email and other productivity benefits. Among the coolest of these features is an automated filter view of all messages from (and to) specific contacts, regardless of which folder the messages are in, with the ability to filter even further, even by attachment type.

Potential Benefits: NEO's much faster and more precise email searching functions are exceptional, plus the incorporation of tabbed filtering and multiple views across all folders makes finding, managing and sorting emails much easier.

On-Demand Accounts Payable Automation from Esker

www.aondemand.com

Think you or your clients have a paperless office? How about your AP? Unfortunately, as much as 80% of invoices are still delivered in paper format, resulting in logjams and literal pileups that slow down processing, require manual signoffs that hamper productivity and can result in missed payments. The new web-based Accounts Payable Automation system can provide relief from these headaches.

Users of the system simply scan invoices and send them to the vendor, who pulls the pertinent data and provides a web-based view for data verification and real-time tracking by AP staff, as well as electronic routing for sign-off. The program automatically archives and indexes the invoice images, and makes them available as XML, CSV or text files.

The on-demand AP system also offers a processing history audit trail for ensuring traceability of all invoices and the actions related to its processing. Other features include coding and class based on user-defined rules, OCR capabilities, and reporting options for overseeing exceptions, due dates, scheduled payments and other information.

Potential Benefits: Simplifying the AP process is always welcome, especially in a manner that reduces paper, streamlines and automates management and tracking, and provides electronic sign-offs.

PowerFlex FSA Software and Administration

www.powerflexsoftware.com

When small businesses grow to the point where they would like to or must offer benefits to employees, management of those benefits plans can become complex and time consuming. And with the issue of flexible spending accounts

(FSAs) or cafeteria plans, the headaches can extend to the employees, who often must wait weeks or longer for reimbursement of qualifying medical expenses.

The PowerFlex system offers businesses the ability to manage FSAs in-house using intuitive software that provides full plan administration support and compliance, along with detailed reporting and calendars for administrative management. Or businesses can have PowerFlex manage it as an outsourced service, providing hands-off administration.

One of the most unique aspects of the PowerFlex system, whether in-house or outsourced, is the ability to offer employees PowerFlex Debit Cards. These cards can be used to directly pay for hospital, physician, dental, vision, prescription, child care, medical equipment and other services. Each payment for approved purchases is deducted from the employee's FSA account, which eliminates the need to wait for reimbursement and also virtually eliminates paperwork.

Potential Benefits: Streamlining and simplifying flexible spending account management is good for the business administrators, plus the debit card payment system is extremely beneficial to employees, saving them from having to wait for out-of-pocket reimbursements.



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