



## CPASiteSolutions — CompleteWebSuite

By Isaac M. O'Bannon

800-896-4500  
www.CPASiteSolutions.com

The CompleteWebSuite package from CPASiteSolutions lives up to its name, providing a full, highly professional website tailored to the needs of public accounting practices. It offers

### CPASiteSolutions

hundreds of pages of automated content, newsletters, financial calculators, secure client portals, staff portals and other valuable tools. Additionally, the system supports Flash and animated graphics, allowing a practice to highly customize its website. Working with the accounting firm, CPASiteSolutions sets up the initial site, after which the firm has full maintenance and editing control. The program costs \$49.50 per month for the basic Silver plan, or less than \$600 per year, with no initial setup cost, and the company offers the first 30 days for free. CPASiteSolutions also offers full-service plans where they handle all system updates, document/image scanning, and provide increased e-mail capabilities and other options through its Gold and Platinum packages.

#### WEBSITE SETUP/MAINTENANCE

As noted above, CPASiteSolutions sets up the initial website for each of its clients, based upon the needs of the firm. The company has more than 150 templates from which its designers work. However, additional modifications are frequently added to further

customize firm websites. For users of the Silver package who will be maintaining their own site, the system's Site-Manager provides a fairly intuitive interface for accessing the various pages of the website for editing, or for adding tools, features and automated content. The program allows up to 500 or more pages per website, with the addition of content generally as simple as selecting one or more items from a list.

Editing existing pages, headers or other sections is quite simple. The user selects the page they want to edit from the site map and then clicks on the section in the page. This brings up a screen that is as easy to work in as a Word document, with format, font and size controls easily selected from lists, as well as bold, italics and other traditional word processing functions. Users can also create web pages in Word and simply transfer it into the online system using its Word to HTML converter. The system also makes it easy to add photos, logos or other images to pages. The editing page also allows switching between design and code views, in addition to offering a preview of the page before actually making it live to the website.

The ease of the program was an important factor for Richard Chadwick, CPA, whose practice recently relocated to the Chattanooga, Tennessee, area. "We have been very pleased with the service and support we have received from CPASiteSolutions. The learning curve to work with the website has been easy to use and easy to modify to suit our needs," he said. The practice is a full service accounting firm that specializes in offering CFO services to small businesses. ★★★★★

#### AUTOMATED CONTENT

Wow! This system provides an outstanding collection of automated information pages for the firm's clients, including more than 3,000 pages of articles prepared by financial professionals, newsletters, financial tips, ways to save on income taxes, business best practices, estate and retirement planning, info on LLCs, and many more, as well as calculators for tax estimation, cash flow, HSA contributions, profit margins, working capital and others. It would take far too much space to list all of the content in this review, but other notable items include a Quick-Books services section, a 14-page IRS problem resolution section, employment opportunities, easy-to-customize staff and partner profile pages, online feedback forms, an electronic tax organizer, due-date calendars, and a contact page that includes driving directions and a map. The system also allows firms to place stock tickers on their websites, as well as local weather and daily headline news. The automated newsletters can be e-mailed to clients from within the system, and all articles within the site include onscreen print and e-mail buttons so clients can easily utilize the material in a format of their choice. ★★★★★

#### VISUAL QUALITY/USER NAVIGATION

The websites created by CPASite Solutions are highly customizable, with multiple placement options for menus and images that enable the firm to brand their site appropriately. The navigation menus utilize submenus that group and organize the site in a way that maintains simplistic navigation and flow, which is a notable feature when

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dealing with a site that can include hundreds of pages. In addition to the ability to easily incorporate personal firm, staff and other photos, the system provides hundreds of stock business images, and the system supports Flash and animated content. For firms without an existing logo, CPASite Solutions also provides a library of pre-designed logos that it will customize for firms for use on their websites. The following site provides a good example of a firm website built with CPASiteSolutions: [www.westlakecpas.com](http://www.westlakecpas.com). ★★★★★

### SPECIAL FEATURES/TOOLS

Special tools and features for the firm include personalized domain name ([www.YourFirm.com](http://www.YourFirm.com)), hosting and 10 e-mail addresses with spam and virus protection that can be managed either through the vendor's servers or through an Exchange server. Additionally, the system provides secure portals for both employees and clients. The staff portal enables users to check web e-mail, their calendar, contact management, task manager, tax organizers, and several other features from remote locations. The client portal allows client collaboration as well as secure online document management using the Secure File Cabinet and Secure File Exchange. An online tax organizer is available for each of the firm's

clients, and the website can be used in conjunction with PayCycle for online payroll and the CPAASP remote access QuickBooks system.

Sites can include more than 50 financial calculators, amortization schedule creation, tax calendars and due-date reminders, refund tracking, appointment setting functions, and an online business incorporation service. CPASiteSolutions also includes the ability for firms to accept credit card payments through their websites. ★★★★★

### SITE MARKETING

To help market and brand the firm, the website's automated e-mail newsletter system allows the firm to easily send out firm-branded and personalized newsletters that contain pre-written financial content. To help market the website (which of course helps market the firm), CPASiteSolutions maintains the online accountant directory ([www.accountant-finder.com](http://www.accountant-finder.com)) and gives its users premium listings, in addition to search engine submission and optimization features that increase the likelihood of search returns on Google, MSN, Yahoo! and other search engines. Site advertising options (pay-per-click) are also available. Detailed website visitor statistics show hits, visits and unique visitors per chosen time period, with graphs and additional information. ★★★★★

### SUPPORT

CPASiteSolutions provides free support, including 24/7 support during tax season. The company's online Help center provides step-by-step instructions, screenshots and tutorials. ★★★★★

### SUMMARY

CPASiteSolutions understands the website needs of professional accountants and has pretty much perfected the art of website design for such firms. At less than \$50 per month, the websites they create provide outstanding content that will absolutely provide value to a firm's clients and prospective clients, along with productivity-enhancing client collaboration tools and other features that are just amazing. The visual quality and organization of the sites are also commendable, providing both firms and website visitors with a great resource that showcases a firm's technological prowess, without requiring the people in the firm to be all that advanced technologically. All sites are initially set up by CPASiteSolutions but can be managed in either a hands-on or hands-off manner.

### 2006 OVERALL RATING

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CATEGORIES COMPANY/PRODUCT	WEBSITE SETUP/ MAINTENANCE	AUTOMATED CONTENT	VISUAL QUALITY/USER NAVIGATION	SPECIAL FEATURES/ TOOLS	SITE MARKETING	SUPPORT	2006 OVERALL RATING	PRICING INFORMATION
<b>AccountantsWorld</b> <i>Accountant's Office Online</i>	4.5	4	4.5	4.5	4	5	4.5	\$695 per year for the website/portal, with no initial setup cost. Optional website setup service has a one-time fee of \$99.
<b>Build Your Firm</b> <i>Website Development &amp; Internet Marketing</i>	4.5	4.5	4	4.5	5	4.5	4.5	Website development package costs \$200 per quarter, with a \$250 setup fee. File transfer is an additional \$60 per quarter. Additional options also available.
<b>CCH,</b> <b>a Wolters Kluwer business</b> <i>ProSystem fx Site Builder</i>	4.5	4.5	4	5	4	4.5	4.5	Program has initial setup cost of \$295 and an annual fee of \$895. Specialized content is available for an additional cost. The company also offers a la carte pricing for additional options.
<b>CPASites.com</b> <i>CPASites.com</i>	4	4.5	5	4	4	5	4.5	The company offers its service in several packages, with monthly pricing depending upon content and features. Bronze package is \$25 per month; Silver \$50; Gold \$85; and Platinum is \$150. There is no setup fee for the Gold and Platinum packages when signing up for one year.
<b>CPASiteSolutions</b> <i>CompleteWebSuite</i>	5	5	5	5	5	5	5	\$49.50 per month for the basic Silver plan, or less than \$600 per year, with no initial setup cost. First 30 days are free. Full-service plans also available through Gold and Platinum packages.
<b>Tenez</b> <i>Accounting &amp; Financial Site Builder (AFSB)</i>	4	3.5	3	3.5	4	4.5	4	\$14 per month (\$159.80 per year) using promotional code TA05. No setup cost. Additional content and services also available.
<b>Thomson Creative Solutions</b> <i>Web Builder CS</i>	4.5	5	4.5	5	4.5	5	5	Initial setup cost of \$250; monthly subscription costs are \$60. Design services and other options also available.
<b>Thomson GearUp</b> <i>Accountant-City/TaxBeacon</i>	4	4.5	3	3.5	4	4	4	All content included with website building system, which is \$499 per year, plus a one-time \$99 setup charge.