Accounting Office Automation. Finally.

Think about how you manage your accounting office now. You have a dozen or more software programs open at any given time. Your client programs don't speak to internal programs, which don't speak to each other. We know; we've been there.

Created, designed and refined by CPA's.

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Accounting Office Automation. Finally.

Built for Accounting Firms

Whether you're on Mac or PC, desktop, phone or tablet, CPApp lets you access all your data, anytime. And all tasks are customizable, so you work your way, not ours. It revolutionizes your process, making it simpler, seamless and incredibly time-saving.

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CPApp
Accounting Office Automation. Finally.

We're accounting professionals. Just like you.

We have solved age old accounting software issues.

Sign up for a 30-Day Free Trial

One Online Solution.
Thousands Of Hours Saved.

- A single, automated, online platform that integrates all your disparate software programs.
- Whether you’re on a Mac or PC, desktop, phone or tablet, CPApp lets you access all your data, anytime.
- Built in time saver functions to automation processes for client and admin tasks.

Dozens of features.
One point of access.

It's your office, online. CPApp is 100% web-based, for anytime, anywhere access to the tasks, jobs, links, passwords and more that make up your day-to-day practice. The app comes with a suite of features that you can customize with your own nomenclature, standards and formats, so your only change is for the better.

CLIENT MANAGEMENT FEATURES

Client Relationship Manager
Documents *everything* client-related, from phone calls to tax reminders to staff notations and more. Allows you to create custom categories, e.g. "Estimated Taxes" or "Follow-up post-4/15" to bring up all notes or attached files within the category. Also includes a thorough search bar for minute details. Easily formats to print with just the items you select for paper/pdf archives. Allows you to attach a file to a note as well.

Due Date Tracker
Tracks dates and for all clients, progress, staff assigned, etc. on one, easy-to-use screen with endless sorting possibilities.

Tracker Reports
Tracks progress of specific tasks-100% customized by you-compared to the prior year. Can be filtered to compare those criteria and date ranges that matter most to you. Easily exports to Excel.

Client Tax Checklist Reminders
Eliminates any question of what data has been sent vs. received. The automated checklist sends email reminders-specific to each client-with what is missing on their tax return, while letting you document all items you are expecting, and note (with a click) when they've arrived. Then generates follow-up emails for those items not yet received. Can send to one client, several, or all at one time. Easily our most used feature and eliminates the "what do I still need to send to you" question we receive from endless clients.

Password Manager

Manages thousands of internal and client passwords, from your Dun & Bradstreet account to your clients' bank accounts. Access is restricted based on staff levels (assigned by you) so the most sensitive passwords are only accessible to those who need them. Can only be accessed by individuals granted access with a two-step system to ensure the correct people have access. Sends a text to your smart-phone to ensure you are who you say you are by requiring a separate device to access.

Contacts

Creates a centralized repository for all client, vendor, personal and business contacts: enables sharing company-wide, or simply allows access from anywhere on any device. Lets you create an infinite amount of custom tags to categorize your contacts. Also allows you to 'link' clients so creating Groups has never been easier!

Client Timers

Simplifies billing with "Speed Buttons" that time your work for a client. After assigning up to 5 clients to your Function Keys, you easily start and stop the timer with a click. Then lets you transfer the accumulated time to your billing system at the end of the day.

Billing Rates

Stores default billing rates for all clients by staff person. Lets you change rates globally or for each client specifically. Tracks the date when a rate last changed so you know when to increase a specific client

E-mail Notifications

Automatically sends customizable e-mails to a category of clients, e.g. estimated tax reminders or messages to business clients about new tax regulations.

OFFICE ADMINISTRATION FEATURES

Web Links

Allows the entire company to share the same "Favorites," for effortless and consistent research and logins. Links can be grouped into subcategories like "Banking," "Taxing Agencies," "Admin," etc. It's your browser Favorites but available to everyone so we all don't need to find the IRS EIN application website individually. It's available for everyone.

Tasks

Assigns a task to an employee, tracks its status and marks it as complete. Intended for non-repeat projects, e.g. dissolve an entity or order a client lunch; tasks do not roll over to a future period. Helps you remember and track the "one-offs".

Staff and Contractor Information

Centralizes names, addresses, default billing rates, levels (for password access), supervisors, and more.

Role Management

Ensures that the right people have the right access and permissions. Fully customizable.

AUTOMATION OF DOCUMENTS

Instruction Sheets

Prints time-saving formatted instructions for all filing forms you send to your clients. A huge time saver and great presentation every time. You select a client name, a jurisdiction, a form and everything fills in on your letterhead, with your logo. You add in the balance due, for example and you're ready to go!

Slip Sheets

Formats preprinted mailing and return address sheets to fit inside standard 8.5" X 11" or 11" X 13" window envelopes. Can use client or taxing agency address to save time.

Mailing Labels

Allows you to print up to eight Avery 2160 mailing labels at a time, or an entire sheet of 30 Avery 5160 mailing labels, from data entered in your Contacts.

Folder Labels

Prints up to 7 Avery 5200 folder labels, pulling data from your Contacts.

Report Covers

Prints a cover for your financial or tax reports, formatted for standard folder and mailing windows. Pulls data directly from your Contacts, with the option of personalizing with your client's logo. Use for financial statement cover sheet, a mailing sheet... whatever.

See the full feature list here.

For any accounting firm, CPApp is a game-changer.

Start Your 30-Day Free Trial Today