

SOFTWARE INTEGRATION: THE GAME-CHANGER FOR CPA FIRMS

How UltraTax CS and NetClient CS work together to increase efficiencies and boost profits

MEET THE FIRM

SS&C Solutions, Inc. is a full-service accounting firm based in Kansas, and serving clients nationwide. **Brian Lang**, Partner and Chief Information Officer of the firm, selects and implements various software packages and manages the technological needs of the business to better serve his clients' needs.

"One of the biggest things I like about Thomson Reuters products is the integration," Lang says. "It makes it very easy for us to do our job efficiently and effectively, and reduces the risk of administrative error."

INTEGRATING ULTRATAX CS AND NETCLIENT CS

SS&C Solutions, Inc. began working with Thomson Reuters in 2002. "I believe that technology is the lifeblood of a CPA firm and helps us move forward," Lang says.

With this belief in mind, SS&C Solutions moved their business forward with the integration of two powerful Thomson Reuters software products—UltraTax CS professional tax software for preparers and NetClient CS private portals that give clients 24/7 access to online accounting services.

"UltraTax CS and NetClient CS, in combination, allow me to serve clients quicker and get returns into their hands to improve turnaround times quickly," Lang says. "When the software talks and communicates, it makes it a seamless process."

Lang estimates that the combination of UltraTax CS and NetClient CS has saved his firm a half hour to an hour per return in administrative time for the processing of tax returns and client deliverables. Time efficiencies are gained because the software integration allows the firm to skip a lot of back-end administrative work, as well as electronically deliver a return to a client while the firm signs and completes the workflow.

"Response from my clients in using NetClient CS portals has been very, very positive," Lang says. "Many of them love the ability to have secure access to their information, and appreciate the forward thinking of providing that level of service." He notes that some of the NetClient CS benefits include the ability for his business's clients to directly upload their tax documents and other information to his firm, reducing travel time on both ends, as well as making it more convenient to collaborate through the secure online portal.



FIRM

SS&C SOLUTIONS, INC.

Brian Lang, Partner and Chief Information Officer

ABOUT

SS&C Solutions, Inc. has approximately 65 employees and four locations across the state of Kansas. The firm serves clients nationwide in a wide range of industries, including banking and finance, insurance, health care, construction and real estate, not-for-profit and employee benefits.

WEBSITE

You can learn more at sccpas.net.

SOFTWARE

SS&C Solutions, Inc. uses UltraTax CS®, NetClient CS®, Accounting CS®, Accounting CS Payroll, FirmFlow™, Fixed Assets CS®, GoFileRoom®, NetFirm CS™, NetStaff CS®, Planner CS®, Practice CS®, ToolBox CS®, Trial Balance CS® and Write-Up CS®.



“THE WAY TO IMPROVE PROFITABILITY IN A CPA FIRM”

“My favorite feature of UltraTax CS and NetClient CS, aside from the integration, is the ability to show a client how the history of their tax information and our correspondences can be displayed, retained in a secure environment and available for them to look at anytime, anywhere, from any device they choose,” Lang says.

Lang takes pride in the fact that his Thomson Reuters software makes his clients’ lives easier through accessibility of information—and how this fact reflects favorably on his firm, too. “A client told me that he was at his banker’s office and his banker needed a copy of his tax return,” he says. “The client was able to log on to that banker’s computer via his NetClient CS portal and give the banker that information immediately, which really made my client happy with the value that we were bringing to that relationship.”

In addition, he believes that the single biggest impact that UltraTax CS and NetClient CS has made for SS&C Solutions, Inc. is the ability to service clients in different geographic markets. The firm’s clients are spread out across Kansas and, by using NetClient CS, the firm can serve clients without excessive travel time. Lang says that SS&C Solutions, Inc. can communicate with clients securely, efficiently, quickly and conveniently for both parties.

“I would recommend UltraTax CS and NetClient CS because I believe that integration and gaining efficiencies is the way to improve profitability in a CPA firm,” Lang says. “And I believe that these products, in conjunction with each other, allow a firm to build their workflows to increase those efficiencies and therefore, improve profitability.”



Lang views Thomson Reuters as a business partner for his firm and other forward-thinking firms. “Thomson Reuters stays abreast of what’s going on in our industry as accountants in the technological areas and helps me stay at the forefront of what firms across the country are doing and delivering to their clients.”



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