

# **Accounting Practice Management Software Category**



## Accounting Practice Management Software Category

Accounting practice management software is designed to help accounting professionals meet their professional obligations, streamline managing client relationships, and collaborate with other team members. This is essential for accounting professionals who need to manage all aspects of their practice. Financial data can be updated in real-time, and workflows are automated so that information is reliably accessible no matter where it is needed.



# Customer Success Report Ranking Methodology

The FeaturedCustomers Customer Success ranking is based on data from our customer reference platform, market presence, web presence, & social presence as well as additional data aggregated from online sources and media properties. Our ranking engine applies an algorithm to all data collected to calculate the final Customer Success Report rankings.

The overall Customer Success ranking is a weighted average based on 3 parts:

## CONTENT SCORE

- ▣ Total # of vendor generated customer references (case studies, success stories, testimonials, and customer videos)
- ▣ Customer reference rating score
- ▣ Year-over-year change in amount of customer references on FeaturedCustomers platform
- ▣ Total # of profile views on FeaturedCustomers platform
- ▣ Total # of customer reference views on FeaturedCustomers platform

## MARKET PRESENCE SCORE

- ▣ Social media followers including LinkedIn, Twitter, & Facebook
- ▣ Vendor momentum based on web traffic and search trends
- ▣ Organic SEO key term rankings
- ▣ Company presence including # of press mentions

## COMPANY SCORE

- ▣ Total # of employees (based on social media and public resources)
- ▣ Year-over-year change in # of employees over past 12 months
- ▣ Glassdoor ranking
- ▣ Venture capital raised

## Award Levels



### MARKET LEADER

Vendor on FeaturedCustomers.com with substantial customer base & market share. Leaders have the highest ratio of customer success content, content quality score, and social media presence relative to company size.



### TOP PERFORMER

Vendor on FeaturedCustomers.com with significant market presence and resources and enough customer reference content to validate their vision. Top Performer's products are highly rated by its customers but have not achieved the customer base and scale of a Market Leader.



### RISING STAR

Vendor on FeaturedCustomers.com that does not have the market presence of Market Leaders or Top Performers, but understands where the market is going and has disruptive technology. Rising Stars have been around long enough to establish momentum and a minimum amount of customer reference content along with a growing social presence.



## 2022 Customer Success Awards

Check out this list of the highest rated Accounting Practice Management Software based on the FeaturedCustomers Customer Success Report.



### MARKET LEADERS



### TOP PERFORMERS



### RISING STARS



\* Companies listed in alphabetical order





#### ABOUT CANOPY



Canopy is building sophisticated, cloud-based software to make resolving IRS collections easier on tax professionals and their clients. It allows effortless gathering of client information and documents, robust tax analytics, auto-completion of tax forms, and more.

34

Total Customer References

[VIEW ALL REFERENCES](#)

### Featured Testimonials

“Canopy has appealed widely to clients who are into technology—they no longer have to mail documents, they’re able to interact with us in a real-time manner. It makes the process simpler and less painful when dealing with taxes.”



NORTHWEST TAX ASSOCIATES

“It doesn’t matter where they are in the world, they always will have access to whatever information is important for them regarding their business in the palm of their hands, on their cellphones through the Canopy app.”



NICO CARDOSO  
SALES AND MARKETING REPRESENTATIVE, OGC ASSOCIATES

“It’s our hub for everything — it controls our workflow, it controls our clients’ communication, it is our server, if you will, for client documents and storage. It’s really the heart of our organization.”



SHAWN FLATTERY  
INTEGRATED FINANCIAL GROUP

“Filling out mountains of paperwork is stressful for clients, so [we] implemented a solution: Canopy’s collections workflow.”



LEWIS HURWITZ  
OWNER, HURWITZ TAX SOLUTIONS

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188  
Total Customer References

[VIEW ALL REFERENCES](#)

#### ABOUT QUICKBOOKS



Small businesses OWN IT every day. QuickBooks is here to celebrate and help that commitment with insights, tools and support. QuickBooks is a very simple and easy to use online accounting software which helps you manage business finances in just a click. Run your business with QuickBooks. Anytime. Anywhere! Intuit QuickBooks is a simple online software for business owners to make informed decisions.

### Featured Testimonials

*“I love QuickBooks for the bank connect feature. It was a very tedious task earlier to reconcile expenses as a start-up due to limited resources. Now I can track payments received from my customers and get a real time view of the P&L and cash flows.”*



HITEST GOSSAIN  
CHIEF EXECUTIVE OFFICER, ONSPON

*“We do payroll, we do job costing, we do our accounts payable, our accounts receivable — we do everything with it.”*



JOSEPH HANSEN  
PRESIDENT, BOILER PROS OF CHICAGO

*“QuickBooks is hands down the best overall business management app on the market. It's affordable, expandable, well known and loved by accounts and office employee potentials alike, for small and large businesses. With IT consultation as one of our primary services, I personally get to see QuickBooks in many different environments, and there aren't many situations to which QuickBooks can't adapt. There's also endless training and help documentation, as well as regional lunch and learns held year round. You just can't beat that.”*



MIKE HEMMES  
CEO, FLASH FIRE DYNAMICS LLC

*“QB Enterprise provides a higher level of sophistication and reporting capabilities. The value in any software application lies in the ability of the user to extract data in a format that allows for timely review to make key management decisions. QB Enterprise has a plethora of standard reports, and are customizable, to accomplish this goal. Secondly, the software is designed for ease of use, in that initial set up is quickly accomplished, basic accounting procedures are simply performed, making it a breeze to train employees on individual tasks within the system.”*



BRIAN LUCAS  
PRESIDENT, BULK TRANSFER, LLC

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#### ABOUT XERO



Xero is a cloud-based accounting software platform for small businesses with over 2.7 million subscribers globally. Through Xero, small business owners and their advisors have access to real-time financial data any time, anywhere and on any device. Xero offers an ecosystem of over 1,000 third-party apps and 300 plus connections to banks and other financial partners. In 2020 and 2021, Xero was included in the Bloomberg Gender-Equality Index and in 2020, Xero was recognised by IDC MarketScape as a leader in its worldwide SaaS and cloud-enabled small business finance and accounting applications vendor assessment.



# 167

## Total Customer References

[VIEW ALL REFERENCES](#)

### Featured Testimonials

“It's great to have the mobile app. You can check on numbers, invoicing and expenses when you're out and about or traveling a lot.”



MARK PADDON  
CEO AND CO-FOUNDER, GUIDEKICK

“The Xero API effect has been huge for Receipt Bank and absolutely instrumental in our exponential growth. We share thousands of customers with Xero and, together, unlock huge efficiencies in bookkeeping.”



MICHAEL WOOD  
DIRECTOR AND CO-FOUNDER, RECEIPT BANK

“I looked at other websites when I was shopping around for accounting help, and I found Xero's interface to be really nice and user friendly.”



NASTARAN MOUSAVI  
PRINCIPAL ARCHITECT, STUDIO BANAA

“Life before Xero was pretty clunky. Xero is a cloud-based system and that's the most convenient thing about it. Our business partners have always got access to the numbers.”



DECLAN LEE  
CO-FOUNDER, GELATO MESSINA

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#### ABOUT ACCOUNTANCYMANAGER



AccountancyManager is a multi-award-winning, cloud-based practice management software - designed by accountants and used by thousands of accountants, bookkeepers and payroll businesses across the UK. Our fully customisable practice management solution enables you to automate your admin, onboard clients with ease and is ready to go straight-out-of-the-box with a quick client import. Sign up today and take advantage of our free 30 day trial.



# 88

## Total Customer References

[VIEW ALL REFERENCES](#)

### Featured Testimonials

“AccountancyManager has saved the practice heaps of time when keeping track of deadlines & we've found the other features (e.g. time recording, client sign-ups) helpful to have all in one place.”



NIALL HAWKINS  
FARROW ACCOUNTING & TAX

“Since switching to AccountancyManager, I now have a sense of comfort in knowing that all client details, tasks and documents are in one place, which is easily accessible. Client onboarding is a swift, simple process that appears slick and professional to our new clients.”



HANNAH JEFFERY  
HJ ACCOUNTS MANAGEMENT

“Signing up to AccountancyManager has been one of the best decisions our practice has ever made. After adapting generic CRM systems to the best of our abilities, AM has been a breath of fresh air and is improving week on week. The fact that the team are friendly, helpful and willing to work with accountants and build a product to service real needs makes it an excellent investment for a minimal outlay.”



CLARE  
TAXKINGS

“AccountancyManager allowed us to solve one of the biggest obstacles in delivering excellent service - the onboarding process. If the onboarding process is done correctly, all the details are in one place and it helps us to deliver the services at speed. Client satisfaction, in our line of business, comes from two things: providing accurate information and providing it with lightning speed. That's why we found AccountancyManager so useful.”



KAMLESH RAJPUT  
CHIEF FINANCIAL OFFICER, STERLING FINANCE

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10

Total Customer References

[VIEW ALL REFERENCES](#)

#### ABOUT BTCSOFTWARE



BTCSoftware is the preferred independent tax compliance software provider for accountancy practices, businesses and individuals. Tax software for small to medium-sized tax and accountancy practices and businesses that you can rely on and trust. They believe that quality software need not be expensive and their self-assessment, corporation tax and practice management solutions combine great design and robust performance with exceptional value for money.

### Featured Testimonials

“A big thank you for your very helpful and efficient assistance today and thank you to BTCSoftware for taking the January deadline into consideration and providing adequate support for us. This tax season is going very well for me and I am very pleased to have chosen the right software provider.”



ROSE NELSON  
RNS BUSINESS SERVICES

“We have been using BTC for over 6 years. Great intuitive integrated software and excellent value for money. BTC support team are very prompt and always willing to help when needed. BTCSoftware has significantly improve our efficiency and over the years BTC has continued to enhance their software to accommodate and adapt to the needs of small accountancy businesses. Thank you BTC for being a great software provider and we highly recommend BTC integrated software.”



LOVETH WATSON  
ODIRI TAX CONSULTANTS

“You asked what I thought of the new practice management system. In short, I think you have a real winner there and I am very impressed. I changed my PM system at the beginning of this year, and it looks like your system could easily make the whole job tracking part of it redundant fairly soon. I can see that you are planning quite a few additional features, yet for me the appeal is how well you have homed in on the key functionalities.”



EDIT GARDNER  
GARDNER WEBB ACCOUNTING LIMITED

“I've been using both the CT and SA software and getting all of my clients onto the database. So far, I'm very happy. It's easy to use and I can see it is going to improve my business by leaps and bounds. I'm very much a person who doesn't read how to do stuff (unless I get really stuck) but just try it and see. The software certainly allows for this type of approach!”



VICKY ROGERS  
ACCOUNTART

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RNS Business Services





#### ABOUT BIGTIME SOFTWARE



BigTime Software delivers time-tracking, billing and project management software for more than 2,500 professional firms, tracking over \$2 billion (USD) of billable time each year. Their flagship product is a SaaS-based system that is custom-built for the professional services industry – specifically, Accounting, Architecture and Engineering, Consulting, Creative, Government Contracting, IT Services and Law firms. BigTime is a venture-funded company based in Chicago committed to helping clients run professional teams more efficiently, unlocking potential revenue and improving profitability within the knowledge economy.

38

## Total Customer References

[VIEW ALL REFERENCES](#)

### Featured Testimonials

“BigTime's ability to host our time and billing system was key for us. They're able to constantly update our software with new features and apps, all remotely. No desktop reinstall.”



RICH CRAIG  
MANAGING PARTNER, 415 GROUP

“BigTime Wallet offered us a way to get payments faster from our clients, and also eliminate any fees within electronic payments on the client end. Because it is so highly customizable, it makes it a no-brainer to use it for billing your clients.”



REN URIARTE  
FINANCE AND HR DIRECTOR, PLATT ARCHITECTURE

“BigTime has provided us with the tools to maximize our efficiency when entering time and expenses against consulting projects. It allows us to easily track hours and budgets against specific projects/activities, and it makes reporting a breeze.”



DANIEL G.  
CO-FOUNDER, RANGELINE SOLUTIONS

“Being able to manage the invoicing and send automated reminders has helped tremendously with accuracy and does help increase our receivables, without the necessary overhead of manually following up.”



COREY ARISS  
VICE PRESIDENT OF TECHNOLOGY OPERATIONS, HAKKODA

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15

Total Customer References

[VIEW ALL REFERENCES](#)

#### ABOUT JETPACK WORKFLOW



Jetpack Workflow is a Cloud-based application that helps accounting professions manage, track, and automate recurring client work. Jetpack Workflow also helps track, All the work for your staff and team, Profitability to specific projects, The time it took to complete the work and much more.

### Featured Testimonials

“It's been great. We started with the workflow management, but as we scaled, we use sub-tasks as tax return checklists for each step in the workflow process. It has allowed us to scale more effectively while keeping our quality and best practices consistent.”



MIKE RUDI  
OWNER, GUYER & ASSOCIATES CPAS

“It's been amazing, I love Jetpack Workflow! We left a clunky system and now that we're set up, I no longer miss deadlines. Now I have a bird's eye view of what's going on in my firm, so I know what my team is doing, and what's the status and updates for our clients.”



MONICA HODGSON-DANIELS  
OWNER AND CEO, GARNETT AND GOLD FINANCIAL CORPORATION

“We moved from spending 35% of our time on admin/non billable client work to only spending 15% of our time (across the entire team!). We were also able to streamline new client onboarding and easily see updates and statuses across our team. Jetpack Workflow allows us to look at reporting in real time and assess our process instantly.”



GIANNA NGUYEN  
MANAGER, NGUYEN & COMPANY CPA

“[Jetpack Workflow] has been very key in keeping track of due dates especially as multiple due dates get missed while we wait on clients to provide information. Things have NOT fallen through the cracks.”



BENJAMIN SZWEDA  
OWNER, SZWEDA CONSULTING, LLC

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#### ABOUT KARBON



Karbon provides a truly collaborative platform for accounting firms to manage workflows, communicate with teams and deliver exceptional client work. Karbon is a team with extensive experience in the accounting and software development industries, committed to improving the way accounting practices work and communicate with their clients.



# 130

## Total Customer References

[VIEW ALL REFERENCES](#)

### Featured Testimonials

“Karbon gives me the ability to oversee the whole department's tasks to make sure of timely completion. In addition, it gives me the ability to move workload around easily. If a staff member leaves or comes onto a new account, the entire workload of tasks can be assigned to that person.”



RENEE FLEKMAN  
MANAGER, ARMANINO LLP

“This software is a game-changer. It is simple-to-use, streamlined and intuitive. Karbon has improved our productivity and visibility, and I'm no longer stuck in my inbox for hours.”



SANDRA MAGANN  
SEACHANGE ACCOUNTING SOLUTIONS

“Prior to using Karbon, the client chase was frustrating because I constantly needed to remind clients. Karbon's automatic client tasks kick-start my projects without me needing to think about it. This means that when I am ready to start a job, I have everything I need.”



SABRINA JOHNSON  
ESSINA BUSINESS FINANCIAL SERVICES

“Have you ever wanted one spot to check email, delegate tasks, manage projects and customers? Karbon is it. Nothing else compares to this robust, all inclusive system.”



MARIEL DIAZ  
ACCOUNTING FOR JEWELERS

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#### ABOUT PRACTICEPRO 365



PracticePro 365 is a unique software platform that was designed to keep your professional services business at the peak of its performance. PracticePro 365 is a unitized cloud practice management software with 8 core features that run your firm, all in 1 platform topped off with real-time visual dashboards. Experience a powerful platform dedicated to boosting enterprise business efficiency and providing an array of unified features that provides your team with the essential tools to succeed and work from anywhere.



## Total Customer References

[VIEW ALL REFERENCES](#)

### Featured Testimonials

*“We’re happy to partner with PracticePro 365. This system, and the team at PracticePro 365, helped us create efficiencies to manage our business more effectively. We look forward to continuing to work together into the future.”*



GREGORY C.R. GALLAGHER  
CHIEF OPERATING OFFICER & GENERAL COUNSEL, HEALTHCARE APPRAISERS INC

*“PracticePro 365 is loaded with features including real-time dashboards, planning and forecasting capability, time and expenses, billing and invoicing, workflow automation, and a complete CRM. You can set any page in the application as your home page which will appear upon login. The application lets you view all active accounts from a single screen, which indicates client type, account or client name, primary contact, and industry.”*



MARY GIRSH-BOCK  
CPA PRACTICE ADVISOR

*“We do not look for software. We look for solutions. Our decision to work with PracticePro 365 was in our alignment as a partnership. We are better together, and that is what stands at the foundation of any of the strategic relationships we work to create.”*



MICHAEL MILLER  
DIRECTOR OF OPERATIONS, MILLER GROSSBARD ADVISORS, LLP

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#### ABOUT SENTA



Senta is a cloud-based practice management platform that was founded to make accountancy practices more profitable, more scalable and to help them deliver great customer service. Senta, voted Practice Management Software of the Year 2019: Cloud-based CRM, marketing, email automation, workflow, secure documents, electronic signing & insights for accountants. Senta provides everything a practice needs to run efficiently and will give you insight into how your practice is really performing.

45

## Total Customer References

[VIEW ALL REFERENCES](#)

### Featured Testimonials

“If I had to choose my favourite feature of Senta, it would be the combination of the level of customisation that you are able to achieve in the workflows, with the customisation you can do in emails, in terms of conditional placeholders and filtering tasks.”



CRAIG MCCALL  
DIRECTOR, ALCHEMY ACCOUNTANCY

“One of the reasons we chose Senta was the flexibility that it gave us in designing and setting up the tasks and workflow to the way that we work as a practice.”



DARREN GLANVILLE  
DIRECTOR OF OPERATIONS, VALUED

“I love Senta! I have used it since the beginning of 2017. It's one of the key tools we use because everybody knows where they are and what they have to do for the day. Senta is integral in our day-to-day work, managing our workflows, emails and text messages. I tried a lot of different software before I came across Senta and signed up for the 30-day free trial. I booked in for a demo and the support team answered everything I was looking for and since then, we haven't looked back!”



FAHAD LATEEF  
PRACTICE MANAGER, LEGEND FINANCIAL

“The great thing with Senta is the workflow and the configuration possibilities. Having the email side for client communication has been a nice additional bonus too, plus being able to automate notifications and send out reminders to clients. It's definitely giving us back time, now we have the configuration and the automation set up. Every payroll is different, so we can create a task for each element and use these building blocks to pull a tailored payroll together for each client. That's what Senta does better than anything else in the market right now. I just wish it could run the payroll for us too!”



HAYLEY WHITTEN  
FOUNDER, BIZNUS PAYROLL

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#### ABOUT FINANCIAL CENTS



Financial Cents, Shahram spent over a year interviewing hundreds of accounting firms to learn about the most significant problems when growing their firm. Through these interviews, he learned that as their team grew, it became difficult to run their firm from spreadsheets. The spreadsheets didn't give them the real-time visibility to easily track the status of work, which caused work to fall through the cracks and missed deadlines.

16

## Total Customer References

[VIEW ALL REFERENCES](#)

### Featured Testimonials

“This program is such a benefit to our accounting practice that we did not want knowledge of it to leak out to other accounting practices.”



JOHN GRIFFING  
MANAGING PARTNER, INTELESOFT FINANCIALS

“The business problem we are solving with Financial Cents is two fold. First, we are improving our internal communications. Second, we are ensuring that no project falls through the cracks.”



MICHAEL MCMULLIN  
MANAGING PARTNER, JACK TRENT & CO

“Clients can get reminded for task they need to complete and they can upload right into the software without setting up a login for themselves.”



KRISTA SIEVERS  
OWNER, ADVANCED PLUS BOOKKEEPING

“Being able to see it on the dashboard in red, we are able to act faster. I can then get in touch with the client and say we need to increase your fees.”



JONATHAN BURNS  
BACK OFFICE STARS

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#### ABOUT MANGO PRACTICE MANAGEMENT



Mango Practice Management (formerly ImagineTime, Inc.) has been providing innovative and affordable time and billing software since 1998. At the request of their clients, they expanded their software to include add-on modules for due date tracking, document management, calendar and client relationship management, and integration with QuickBooks and tax software. Their focus is on the small business marketplace and their approach is let the customer pick which mix of modules is appropriate for their firm. As a firm grows their client base and expands their services, ImagineTime is still the perfect fit due to the ease and low cost of adding on modules.

19

## Total Customer References

[VIEW ALL REFERENCES](#)

### Featured Testimonials

“I'm impressed with Mango's features and user experience. It's hands down the best software I've used in my practice. It streamlines all aspects of my firm and ensures I get paid more quickly. Everything about Mango caters to the needs of accountants – it does the heavy lifting of running my firm so that I can focus on my clients.”



JAMES L. KENT, CPA, PC

“I implemented Mango Billing 5 months ago for our firm and wanted to drop you a line to thank you. Over my 27 year career as a CPA we've used 4 different time and billing systems. I was looking for a web based application that was easy to use. Our previous desktop software was too cluttered with unimportant fields, verbose reports, and had occasional technical problems. I had been evaluating software for several months to replace our desktop system and was very pleased when I ran across Mango Billing. The extensive features and simplicity are spot on for my firm. The staff find the dashboards useful and they love the time tracking features. Finally, I can't tell you how much I appreciate your personal attention to my needs and flexibility in helping me setup the system. Thank You!”



STEPHEN SCOTT  
SCOTT & CO

“Our firm recently began using [Mango]. Our data converted from our previous program quickly and smoothly. Their support staff has been extremely helpful to us. The reports that are generated from this software are excellent, as they give us the information we need to manage our practice efficiently. I was able to learn the program quickly, and I find that it is very user-friendly. We are very pleased overall with [Mango].”



MISTY ENDERS  
HARTWELL & COMPANY

“I love [Mango]! My billing time has been cut by 75% with a lot less stress. Training was excellent and support is always fast, friendly and helpful. I would never change to another software.”



VICKI DEWEESE MEMPHIS  
DEWEESE HOWELL & ASSOCIATES

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#### ABOUT OFFICETOOLS



OfficeTools is an industry-leading vertical SaaS provider for the compliance-focused Professional Services market. They provide purpose-built, cloud-based solutions for small and medium-sized Legal and Accounting firms to support a secure and cloud-enabled practice. Their highly differentiated cloud infrastructure puts customers' business data and vital applications into a virtual workspace accessible anywhere, anytime, and from any device.



# 13

## Total Customer References

[VIEW ALL REFERENCES](#)

### Featured Testimonials

“Our basement was full of years of paper copies of returns. Now with OfficeTools, we’ve eliminated the need to create or store paper files.”



MICHAEL ROSEDALE  
CPA TAX PARTNERS

“I switched to OfficeTools so that we would stop losing time that I wasn’t tracking or billing for. After implementing OfficeTools WorkSpace, we started using Project Management, Document Management, and we’re now able to track and reallocate work from employees that have too much work.”



LEANN RISENHOOVER  
LEANN RISENHOOVER, CPA, PLC

“OfficeTools has changed our firm, it is just wonderful. Being able to know in the process where we are with tax returns, find the files, have good metrics about where we’re spending our time, and overall managing our practice has made a huge impact. We’re just thrilled.”



JULIA RHODS  
SALLY LINDBERG & ASSOCIATES

“We decided that we just needed something that was all-in-one. We wanted to get our CRM and our Documents all in one place. We gave OfficeTools WorkSpace a try, and so far we’re very satisfied. It’s very easy to keep track of what you have to do. The staff knows what to do, and all the partners and managers can see who’s busy and who’s not.”



HOWARD GASTWIRTH  
KIRSCH KOHN & BRIDGE

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#### ABOUT PIXIE

# PIXIE

Pixie building a sustainable business that makes practice management simple, effortless and delightful for small accounting and bookkeeping firms across the globe. They Built for small accounting & bookkeeping firms. Everything you need to manage your clients, deadlines, workflow, email and team in one easy-to-use app.

36

Total Customer References

[VIEW ALL REFERENCES](#)

## Featured Testimonials

“Whether you’re a small bookkeeper or a large accounting firm, there’s huge scope to improve the efficiency of your processes using Pixie. Plus, even if you have brilliant software, if there’s no support, it’s not going to impress you, but that’s never been the case here.”



WIJAY KANAGASUNDARAM  
WIS ACCOUNTANCY

“Pixie’s email integration is outstanding, because we can log in and send emails directly from the platform, and have all associated jobs update automatically without us having to do anything.”



DAN RYDER  
OWNER, LEVEL ACCOUNTING

“Pixie has been a lifesaver for our small but growing firm. It provides everything we need to streamline workflows and track deadlines. I really appreciate how responsive the team are when things arise.”



JESSICA FARMER  
CO-FOUNDER & CHIEF OPERATING OFFICER, FORAY BUSINESS GROUP

“It’s the best tool we’ve seen in years for accounting firms. We love the simplicity, the core features, the ease of use and ease of implementation.”



KIERAN PHELAN  
FOUNDER & PRINCIPAL, CLOUD 360 ACCOUNTING

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