



Accounting Practice Management Software Category

SUMMER 2026
Customer Success Report





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.

2026 Customer Success Awards

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



* Companies listed in alphabetical order



2026

**ACCOUNTING
PRACTICE
MANAGEMENT
SOFTWARE**

MARKET LEADER





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.

66 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

“Canopy better serves our needs, has more efficiencies, and it’s better cost saving when we take it in and aggregate to all of our other tools.”

SEAN M. DUNCAN
PRESIDENT AND CPA, SMD CONSULTING & ACCOUNTING, LLC

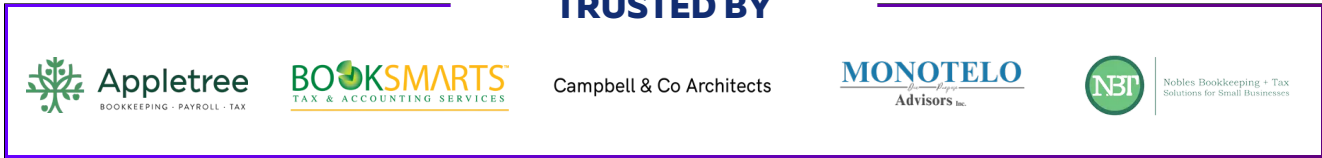
“Canopy gave me back at least four hours a day. That means a lot, especially when you have 60-80 hour work weeks.”

BIANCA FERGUSON
FOUNDER, TAXBEE & CO

“Choosing the right software made training and onboarding staff easy.”

EMILIA MCAFEE
TAX ATTORNEY, WE LEGAL, APC

TRUSTED BY





ABOUT KOHO PSA



Koho PSA is the most trustworthy and widely used practice management software for accounting firms in the Nordics. With Koho PSA, you'll manage your workflow effortlessly and never miss out on invoicing. You are able to centralize all your work, clientele and data, reducing unnecessary manual work. Their software helps thousands of accountants and bookkeepers to manage their daily work, and most importantly, save time. Don't ruin your days by using Excel – make your working hours excellent with the help of Koho PSA.

17

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Koho PSA's ticketing helps in my accounting work management tangibly. Customer communication doesn't get mixed up with my personal messages and newsletters in my mailbox, and I get work done more efficiently. Also, no work time is wasted by looking for important customer messages.”

JUKKA-PEKKA INKINEN
ENTREPRENEUR, FINANSIO

“Thanks to Koho PSA, our work is nowadays well organized. We don't need to overload our memory with unnecessary things and deadlines. Koho PSA reminds us what to do and when. All work gets done, and working in general is more systemized.”

SALLA SAARINEN
KHT-ACCOUNTANT, TILIHALME

“Accotilit is a small accounting firm, where customer relationships are long and the entrepreneur-accountant connection strong. Before this, we didn't even recognize the need for a PSA.”

RIKU SALOMAA
ENTREPRENEUR, ACCOTILIT OY

“The best features of Koho PSA for us are the easy work time entries, effortless contract invoicing, and the timely flexitime tracking.”

SANNA METSÄNORO
CHIEF EXECUTIVE OFFICER, MEDIATILI



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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.

217

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“We know tracking time to measure performance and efficiency is a crucial practice amongst high-performing accounting firms to succeed. We also know Matt Rissell and the entire QuickBooks Time team are amazing people to work with. So this was a no-brainer.”

STUART MCLEOD
CHIEF EXECUTIVE OFFICER AND CO-FOUNDER, KARBON

“QuickBooks simplifies my team’s according tasks and provides me with a 360-degree view of my business- anywhere, anytime. QuickBooks is the perfect online accounting solution, in terms of features and cost, that every growing startup needs.”

SHARAT KHURANA
BELONG.CO

“The way that the QuickBooks POS integrates with QuickBooks financial software is just such a seamless process that it makes our job as accountants so much easier. It’s wonderful, I love it. I can’t say enough.”

LAURYN CHARLES
OWNER, ACCOUNTABLE FINANCIAL SERVICES GROUP

“When it comes to QuickBooks Online, our customers have really seen the light because they like the integrations and everything they can do now.”

JENNIFER BRAZER
FOUNDER & CEO, COMPLETE CONTROLLER



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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...

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TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“In Xero, we're able to go through and make quick reports for ourselves and be able to see where we're at for different periods of time, year over year. We're able to see a glimpse of our cash flow a few months in advance, which is very critical.”

ERIC STEVENS
GOOD WOOD

“Xero stood out to us as software that would work for us, but also grow with us. It's really helped with inventory, planning and management. Not just from an inventory perspective, but even in terms of managing people.”

HANNAH
MUST LOVE

“Xero is so interactive. It gives the client a sense of what's going on in their business, as opposed to before when they'd have to wait for their accountant to send them an income statement.”

NKHESANI KAPENA
MANAGING DIRECTOR, ZERO 1.2.3.

“With XPM, we've eliminated a separate time keeping system, a separate billing system, and a separate job costing system.”

CAROL HOWER
PRACTICE PRINCIPAL, TEAMWORKS

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2026

**ACCOUNTING
PRACTICE
MANAGEMENT
SOFTWARE**

TOP PERFORMER





ABOUT BIGTIME SOFTWARE



Merged description: BigTime helps professional services businesses operate more effectively to better plan, manage, and get paid for client work. It provides cloud time and billing tools, project budgeting, resource management, analytics, and reporting for professional services firms, with strong QuickBooks integration.

104 TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“BigTime is a solution that addresses the unique problems facing IT companies and software development agencies like us. We configured it to match our processes perfectly and implemented many extra features. The BigTime team was ready to help us at every stage of the implementation.”

PAUL JOSIEK
CHIEF OPERATING OFFICER, FUTURE MIND

“BigTime has become the base system for team and project portfolio management from both the financial and workload perspective. It's now the main system used by our project managers and the only source of information for me as Head of Delivery.”

AGNIESZKA UZNAŃSKA
HEAD OF DELIVERY, ITCRAFT

“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
DIRECTOR OF FINANCE, PLATT ARCHITECTURE

“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

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ABOUT BRIGHT



Bright, an accounting software company, consistently receives praise for its ease of use, feature-rich platform, and excellent customer support. Reviews from a diverse range of companies, including small businesses and larger organizations, reveal a high level of satisfaction with their payroll software, BrightPay's, ability to streamline payroll processes efficiently. The most overwhelmingly positive themes focus on their software's user-friendly interface and the prompt, knowledgeable customer service.

642 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Having used BTCSoftware for the past few years I really can't be thankful enough for the help and support of this company. With them we have been able to expand our business 100% year on year. Very simple and straightforward to use and has saved us thousands of hours. The team is great; the questions we have had for them have been dealt with efficiently. We have close to 1,000 clientele and the secret to our success has been this software. Simply brilliant!”

SOHAIL NAWAZ
TAX LOUNGE

“In BrightBooks it's easy to set up bank rules and its use of AI picks things up very quickly. It's just making it more efficient and saving us time. For example, Stephanie saved a huge amount of time using the integration between BrightBooks and BrightAccountsProduction, to cut down on duplicating work and picking up trial balances from the bookkeeping end and dropping it into accounts production end.”

MARK THOMAS
ASSOCIATES, XEINADIN

“While I found Surf Payroll to be efficient, its reporting capabilities were quite restrictive, lacking features like historical data viewing and customisable report creation. When BrightPay emerged as an alternative, despite not being fully cloud-based, its compatibility across multiple devices, like laptops and PCs, appealed to me, leading me to explore its potential as a payroll solution.”

AYLISH MORRISSEY & CO

“Our payroll team has now grown to five. And as well as our own team growing, we have grown our client base. We see an average of 10-15 new payroll customers a month.”

BECKY DILLON
HEAD OF PAYROLL, ACCOUNTS AND LEGAL

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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.

27

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“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

“I really love the templates that Jetpack has. We were able to custom design the templates to meet our own needs and for each department here. That’s offered us a lot of flexibility and helps us keep track of everything. Nothing gets missed, and all the notes are there.”

NANCY BENET
ENROLLED AGENT, FIXIT ACCOUNT INC.

“Jetpack kept my stress levels down during the busy tax season so that I knew everything was where I needed it to be and that the workflow was moving along without having to manually watch over it.”

JACKIE MEYER
FOUNDER, MEYER TAX CONSULTANTS

“JETPACK IS AMAZING! I don’t know how else we could manage recurring tasks within our business otherwise.”

NIKKI TOMES
OWNER, ATLANTIC REAL ESTATE MANAGEMENT, LLC

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ABOUT KARBON



Karbon is a Practice Management platform for accounting firms. It provides a truly collaborative platform to manage workflows, communicate with teams and deliver exceptional client work. By combining email, discussions, tasks and powerful workflows, Karbon aligns your team with a single place to communicate and collaborate, increasing capacity to deliver on time and budget.

172

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“With Karbon everything is there. We can see history from long before the merge for either side, ensuring we can answer questions as a complete group with the complete picture.”

VICTORIA PETERS
GAUVREAU

“Karbon gives us the ability to plan ahead and shift work forward or back as needed, and to work better as a team by helping each other with assigned work.”

LAUREN THIEL
THE REAL THIEL

“Karbon has enabled us to cope well with working remotely. I feel more connected to my team and work compared to when I was actually in the office!”

AIDAN MALONE
MALONE ACCOUNTING LTD

“Karbon is the vehicle that allows us to deliver what we need... This is a technology that will revolutionize your business. Take it seriously.”

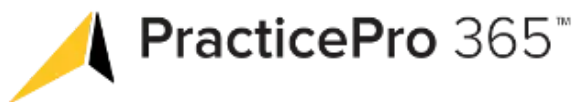
TIM PETREY
HD GROWTH PARTNERS

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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.

8

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“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

“PracticePro 365™ will allow us to streamline our processes throughout the client lifecycle, delivering a best-in-class team member and client experience. Beyond the efficiencies this system creates internally, PracticePro365 will provide us dynamic visibility into all aspects of our firm to improve productivity and grow revenue.”

KEVIN O'CONNELL
MANAGING PARTNER, MACIAS, GINI & O'CONNELL

“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

“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

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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.

47

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“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

“Senta’s particularly important because there’s internal compliance I need managed. For example, I know a client has been sent something and it’s been approved by the client. Templates that make sure things are done month-in and month-out, that every client is reminded to pay their tax on time – and it has their bank details to enable them to do so. Senta can automate that delivery. I can consistently and confidently know a quality of service is delivered at all times.”

STEVEN CASE
CHIEF EXECUTIVE OFFICER, FINANCE BOX

“As for Senta, it seemed more relevant and feasible to build it as indispensable tool to drive our practice as a result of what we can do with it. No one tool is perfect, but it has certainly checked more boxes than any other tool we’ve seen on the market.”

KEVIN ROBERTS
OWNER, ROBERTS CPA

“The Senta support team has always been brilliant; either pointing to user guides or the great Senta community Facebook group.”

NEIL CRIDDLE
NDC ACCOUNTING SOLUTIONS



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ABOUT TAXDOME



TaxDome is an all-in-one integrated solution to save you time and money. Their software is suitable for accounting firms, CPAs, bookkeeping and tax preparation. They have a range of features, including an internal communication platform for your team, a secure portal to share client documents and a well-structured CRM and project management feature to help you and your team always hit your deadlines.

91

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“I would definitely recommend TaxDome to all SmartVault users, especially solo practitioners, due to the price. And the features that TaxDome provides allow you to be really efficient. You can start using it as backup storage and save money because it's seven hundred dollars less than SmartVault.”

TATSIANA BENDER
BENDER CPA

“I'm a sole proprietor, and TaxDome is my office manager, my biller, my workflow, my email. This frees up my time, so I can focus more on my clients and getting the work done, rather than babysitting a bunch of small tasks.”

JOE BOURQUE
FOUNDER, JB TAXES

“TaxDome is a blessing for any accounting firm no matter how big or small.”

SAHIL RAJPOOT
CHIEF EXECUTIVE OFFICER, ECCOUNTANT

“TaxDome has enhanced my goal of becoming a 100% virtual company.”

KIMBERLIANN CHAMBERS
TAX ADVISER, DOLLARS & CENTS ACCOUNTING

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ABOUT TPS SOFTWARE



TPS Cloud Axis was designed with small to mid-sized accounting firms in mind. With TPS Cloud Axis, you can manage and optimize your practice from home, the office, or anywhere. *Easily track your time and generate customizable invoice. *Keep your tasks from slipping through the crack with our easy-to-use Office and employees calendar workflow calendar *Track all incoming and outgoing emails with bi-directional sync with Outlook 365 and Gmail. *Clients...

9
TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“The Youtube videos were helpful in learning the platform. They are also good for training the employees in how to use the program. They show you how to use different things and features in the program. I watched all of them. It was really easy to follow along with them.”

ANGELICA ORTIZ
LEAD BILLING REPRESENTATIVE, ETRENDS GROUP

“Because TPS is a specialized time and billing system, it works so much better for accountants. The other system had way too many bells and whistles we didn't use.”

LINDA SPENCER
FIRM ADMINISTRATOR, PARMS + COMPANY

“If you're seeking a software solution that offers simplicity, coupled with comprehensive and meticulously displayed features, I highly endorse TPS.”

JULIA SCHWARTZ
ENTESA GROUP

“I have been a TPS user since 2005. I could not have practiced or grown my practice without TPS.”

LEONARD SZYMANSKI
LJ CORP

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2026

**ACCOUNTING
PRACTICE
MANAGEMENT
SOFTWARE**

RISING STAR





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.

70

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“I'm all about customer support, and Financial Cents does that 100%. They listen and respond. They don't just go, 'Oh, yeah, we heard that suggestion before,' and put it on a back burner. I can't do that to my clients, so I appreciate that the company I use to manage my business doesn't do that to me.”

KATHY NASH
FOUNDER, NASH FINANCIAL SOLUTIONS, LLC

“Financial Cents enables us to send each document request as a line item to get their bank statements, credit card statements, receipts, etc. Thanks to the (passwordless) client portal, clients can see completed and outstanding document requests, and Financial Cents will auto-remind them for us.”

STELLE ANDERSON
OWNER, INFINITE ACCOUNTING SOLUTIONS

“Asana was great for task management but did not allow us to track monthly fees vs time worked. This is important to us because we're continuously growing our company. We have to know when it is time to hire.”

ANGELA MAIN ROBERTS
CHIEF EXECUTIVE OFFICER, MAIN ACCOUNTING SERVICES

“Financial Cents has helped us keep track of all the various little things we need to do so things don't slip between the cracks.”

ERIN LOUIS
PRESIDENT, ADVOCATE ACCOUNTING

TRUSTED BY





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...

22

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“ 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... ”

STEPHEN SCOTT
ST. LOUIS, MISSOURI

“ 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... ”

STEPHEN SCOTT
SCOTT & CO

“ Thanks again for your help, I have mentioned Mango Billing to a few groups of colleagues, so hopefully they sign up soon as well. I used Jetpack Workflow, SmartCenter, ATOM and Mango beat them all in client management, time tracking and billing, and scheduling. If you guys can somehow add document management to it that will let you view, edit, save files directly in the system then you guys will definitely win over a lot of Tax and... ”

WINAI XIONG
PAYROLL & TAX SOLUTION

“ 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

TRUSTED BY





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.

22

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

“We made the smart choice by moving our firm and all of our files to a secure cloud environment.”

VINCENT NGUYEN
ACCOUNTANTS, NTV ACCOUNTANTS

“Office Tools could function as the central hub for everything we do.”

GREG DICKSON
SHAREHOLDER, THE ACCOUNTING DEPARTMENT FOR NONPROFITS

“We already had OfficeTools champions in-house.”

DUSTIN POLAND
CFE AND DIRECTOR OF OPERATIONS, KDP CERTIFIED PUBLIC ACCOUNTANTS

TRUSTED BY





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 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

“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

“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

TRUSTED BY



ABOUT TAXAROO



Taxaroo is a modern cloud-based tax practice management tool. They enable tax professionals to spend more time providing value-add guidance to their clients, and less time collecting information, doing follow ups, and managing the endless bits of workflow. Clients have a simple clean experience working with their tax preparers in a secure virtual environment.

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TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Taxaroo helped me take my business to a more professional level. I feel confident about being organized as well as compliant with the IRS. Plus, I’ve been able to train other tax preparers to use it as well, and they were able to pick it up quickly.”

PHILICIA CARTER-BLUE
FOUNDER, CARTER-BLUE CONSULTING

“Taxaroo allowed me to get rid of two different subscriptions I was paying for so far and reduced my overall yearly cost. With the features, cost reduction and their great support, it’s been well worth the switch.”

GINA WELLER
OWNER, WELLER CONSULTING

“With Taxaroo, I went from doing 200 returns a year to over 400, while keeping everything organized and streamlined. I’m able to work for 3 months and take the rest of the year off to travel.”

SALLY TRAUCO
OWNER, COASTAL TAX MASTERS

“With Taxaroo, I was able to do over 250 returns in my very first year going out on my own. I couldn’t have done this without Taxaroo in my first year.”

BRANDI ALEWEL
RTRP, OWNER, BRANDI’S TAX SERVICE

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ABOUT UKU



Uku is an accounting practice management software - Improve credibility, growth and employees' happiness in your accounting practice. Digital smart assistant rewards you with an organized workflow, protects you from unexpected surprises, removes unnecessary stress and helps you to take the best care of your clients.

36

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“You get in a good mood from using Uku. Unfortunately, the translation has been done a bit quickly, but you will smile when you see some of the translations.”

FREDERIK SANDGRAV
DIRECTOR, SANDGRAV SOLUTIONS

“Now using Uku, when an accountant changes, there isn't a situation where we can't serve a client because we do not know their tasks.”

HELARI PALLAS
PARTNER, GROW FINANCE

“Uku gives both the accountant and the management an overview of how much time is spent on what kind of work or communication.”

PIRET TOOTMAA
IT MANAGER AND ACCOUNTANT, NUMERI

“Now that reminders appear automatically on our dashboards, we save around 20% of time spent on task management.”

THOMAS FOX MAULE
ACCOUNTING CONSULTANT, SANDGRAV SOLUTIONS

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