



20 leading software apps for modern accounting firms



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Why we wrote this guide

So many accounting firms today operate with archaic, disjointed tech stacks, making it impossible for them to increase efficiency.

It's obvious apps are at the core of your technology strategy.

But with so many apps available – and all of them claiming to do it all – honing down what you need seems impossible.

That's why we wrote this guide.

It provides a comprehensive overview of the top categories to ensure you have in your tech stack – and the app we recommend on each category.





Overview

We've chosen to split things up into the following 20 categories:

- Client Relationship Management
- Email Marketing
- Meeting Scheduling
- Proposal Creation
- KPI Reporting
- Document Collection
- Client Portal
- Practice Management
- Time Tracking
- Tax Preparation
- Financial Reporting
- Virtual Meetings
- Meeting Note Taking
- Password Management
- Internal Collaboration
- Project Management
- Unified Inbox
- File Storage
- Invoicing
- Process Automation

Do note that you may have an app that covers several categories well enough for your needs.

But don't fall into the trap of trying to find one app to do it all.

It's the "1-app tech stack" fallacy. It doesn't exist.

Consolidate when you can.

But when in doubt, pick the best tools for the job – and integrate them together.





Client Relationship Management

Pipedrive

Pipedrive is a sales CRM that helps accounting firms streamline their lead management and client onboarding processes. Its intuitive pipeline view allows firms to track prospective clients from initial inquiry to signed engagement, ensuring no opportunity is overlooked.

With features like automated follow-ups, activity scheduling, and integrations with tools like QuickBooks or Xero, Pipedrive optimizes client acquisition workflows, saving time and boosting conversion rates.

Pricing

Pipedrive's pricing ranges from \$24 to \$129 per month.

Free Trial

Pipedrive offers a 14 day free trial with no credit card required.



Email Marketing

Kit

Kit is an email marketing platform ideal for accounting firms seeking to nurture client relationships and grow their audience. Designed for simplicity and effectiveness, it offers automation for lead nurturing, segmenting email lists by client type or service interest, and delivering personalized campaigns.

Accounting firms can use Kit to keep clients informed about tax deadlines, industry updates, and value-added services, strengthening client engagement.

Pricing

Kit's pricing ranges from \$0 to \$167 per month for up to 10,000 subscribers.

Free Trial

Kit offers a 14 day free trial with no credit card required.





Meeting Scheduling

Calendly

Calendly is a scheduling tool that simplifies booking client meetings for accounting firms. It eliminates the back-and-forth emails by letting clients pick available time slots directly linked to the firm's calendar.

With options to set buffer times, send reminders, and integrate with video conferencing tools like Zoom, Calendly enhances professionalism and efficiency, making it easier to manage tax consultations, onboarding sessions, or recurring check-ins.

Pricing

Calendly's pricing ranges from \$0 to \$20 per user per month.

Free Trial

Calendly offers a 14 day free trial with no credit card required.



Proposal Creation

Ignition

Ignition is an all-in-one proposal, contract, and payment management solution tailored for accounting firms. It streamlines client engagement by enabling firms to create polished, customizable proposals and contracts that can be signed electronically.

With built-in billing and automated recurring payments, Ignition eliminates manual invoicing, ensures prompt payments, and improves cash flow, allowing firms to focus more on client service.

Pricing

Ignition's pricing ranges from \$49 to \$499 per month.

Free Trial

Ignition offers a 14 day free trial with no credit card required.





KPI Reporting

Databox

Databox is a powerful analytics platform that helps accounting firms monitor KPIs and provide data-driven insights to clients. By consolidating data from sources like QuickBooks, Xero, and Google Analytics, it enables firms to create custom dashboards for tracking metrics like revenue, profitability, and cash flow.

Databox's real-time reporting capabilities make it a valuable tool for both internal performance monitoring and delivering actionable insights to clients, enhancing advisory services.

Pricing

Databox's pricing ranges from \$0 to \$399 per month for up to 3 data sources.

Free Trial

Databox offers a 14 day free trial.



Document Collection

Content Snare

Content Snare is a document collection tool designed to simplify the process of gathering client information for accounting firms. It automates document requests, reminders, and follow-ups, reducing the need for back-and-forth emails.

With an intuitive interface, clients can easily upload files, while firms track progress in real time, ensuring that critical tax forms, statements, or compliance documents are collected efficiently and on time.

Pricing

Content Snare's pricing ranges from \$35 to \$215 per month.

Free Trial

Content Snare offers a 7 day free trial with no credit card required.





Client Portal

Copilot

Copilot is an all-in-one client portal solution designed to streamline client communication and collaboration for accounting firms. It provides a secure, centralized platform for sharing files, managing tasks, and collecting payments.

With features like branded portals, messaging, and seamless integrations with tools like QuickBooks and Stripe, Copilot enhances the client experience by offering a professional, easy-to-use interface. Accounting firms can use Copilot to simplify document exchanges, track project progress, and maintain consistent communication, reducing inefficiencies and improving client satisfaction.

Pricing

Copilot pricing ranges from \$59 to \$599 per month.

Free Trial

Copilot offers a 14 day free trial with no credit card required.



Practice Management

Karbon

Karbon is a practice management platform tailored for accounting firms, combining task management, team collaboration, and email integration. It helps firms manage client workflows by automating repetitive tasks, assigning responsibilities, and tracking deadlines in a single place.

With real-time visibility into team capacity and project status, Karbon ensures that every client engagement runs smoothly, improving efficiency and accountability across the firm.

Pricing

Karbon's pricing ranges from \$79 to \$99 per user per month.

Free Trial

Karbon offers a 14 day free trial with no credit card required.





Time Tracking

Harvest

Harvest is a time tracking tool that helps accounting firms accurately log billable hours for client projects. With features like project tracking, invoicing, and expense management, Harvest ensures firms can monitor profitability and ensure accurate client billing.

Its intuitive interface and integrations with tools like QuickBooks and Asana make it a valuable resource for managing time effectively and maintaining transparency with clients.

Pricing

Harvest's pricing ranges from \$0 to \$17.50 per user per month.

Free Trial

Harvest offers a 30 day free trial with no credit card required.



Tax Preparation

Intuit ProConnect

Intuit ProConnect is a comprehensive tax preparation software designed to meet the needs of accounting firms handling complex tax returns. It integrates with QuickBooks and automates data entry, reducing errors and saving time.

With cloud-based accessibility and built-in tools for managing client tax documents, ProConnect streamlines the tax preparation process, enabling firms to efficiently handle individual and business returns while maintaining compliance.

Pricing

Intuit ProConnect's pricing starts from \$2,799 for up to 50 returns.

Free Trial

Intuit ProConnect offers a free trial with no credit card required.





Financial Reporting

Fathom

Fathom is a financial reporting and analysis platform that helps accounting firms deliver meaningful insights to their clients. By integrating with accounting tools like QuickBooks and Xero, Fathom provides customizable dashboards, financial performance reports, and KPI tracking.

It enables firms to offer advisory services by visualizing trends and metrics, helping clients make informed financial decisions and improve profitability.

Pricing

Fathom pricing ranges from \$13.60 to \$50 per company depending upon volume.

Free Trial

Fathom offers a free 14 day trial with no credit card required.



Virtual Meetings

Zoom

Zoom is a leading virtual meeting platform that simplifies communication for accounting firms. With features like video conferencing, screen sharing, and breakout rooms, Zoom is ideal for client meetings, team collaboration, and training sessions. Its ease of use and reliability make it a go-to tool for maintaining clear communication, especially in remote or hybrid work environments.

Pricing

Zoom's pricing ranges from \$0 to \$21.99 per user per month.

Free Trial

Zoom offers a free 14 day trial.





Meeting Note Taking

Fathom AI Notetaker

Fathom AI Notetaker is an AI-powered meeting assistant that simplifies note-taking during virtual meetings. Designed to integrate seamlessly with Zoom, it automatically records, transcribes, and summarizes key points from discussions, saving time and ensuring no details are missed.

Accounting firms can use Fathom AI Notetaker to keep track of client conversations, action items, and critical updates, enabling teams to focus on engagement rather than manual note-taking. The tool's easy-to-use interface and real-time capabilities make it an essential productivity enhancer for busy professionals.

Pricing

Fathom's pricing ranges from \$0 to \$39 per user per month.

Free Trial

Fathom offers a free 14 day trial.



Password Management

Keeper

Keeper is a top-tier password management solution for accounting firms, offering secure storage and sharing of credentials. It uses advanced encryption to protect sensitive information and enables team members to manage and share passwords securely. With features like dark web monitoring and compliance reporting, Keeper enhances security and ensures peace of mind for firms handling confidential client data.

Pricing

Keeper's pricing ranges from \$2 to \$3.75 per user per month.

Free Trial

Keeper offers a free 14 day trial.





Internal Collaboration

Slack

Slack is a versatile communication tool that streamlines team collaboration for accounting firms. It organizes discussions into channels, allowing teams to separate conversations by client, project, or department. With instant messaging, video calls, and integrations with tools like Google Workspace and QuickBooks, Slack enhances internal communication and ensures team members stay aligned on tasks and updates in real time.

Pricing

Slack pricing ranges from \$0 to \$15 per user per month

Free Trial

Slack offers a 14 day free trial with no credit card required.



Project Management

ClickUp

ClickUp is an all-in-one project management platform designed to help accounting firms organize, track, and execute client engagements. With customizable task views, time tracking, and automation features, ClickUp enables teams to streamline workflows, set deadlines, and monitor progress. Its flexibility allows firms to manage everything from client onboarding to tax preparation in a single, centralized hub.

Pricing

ClickUp pricing ranges from \$0 to \$19 per user per month.

Free Trial

ClickUp offers a free 14 day trial with no credit card required.





Unified Inbox

Front

Front is a shared inbox platform that consolidates emails, messages, and client communications into one interface. Designed for teams, it allows accounting firms to assign conversations, collaborate internally on responses, and track communication history, ensuring prompt and consistent client service. With integrations to accounting tools and CRMs, Front improves efficiency and ensures no message goes unanswered.

Pricing

Front pricing ranges from \$29 to \$99 per user per month.

Free Trial

Front offers a free 14 day trial with no credit card required.



File Storage

Google Workspace

Google Workspace provides secure and scalable cloud-based file storage through Google Drive, allowing accounting firms to organize, store, and access client documents and firm data from anywhere. With features like shared drives for team collaboration and granular permission settings, firms can maintain control over sensitive information. Integration with tools like Google Docs and Sheets enables real-time editing and sharing, while robust search capabilities make it easy to locate files quickly. Its strong encryption and compliance with industry standards ensure data security, making Google Workspace an ideal solution for managing critical documents in accounting practices.

Pricing

Google Workspace's pricing ranges from \$6 to \$18 per user per month.

Free Trial

Google Workspace offers a free 14 day trial.





Invoicing

Stripe

Stripe is a payment processing platform that enables accounting firms to create and manage invoices seamlessly. It supports one-time and recurring billing, automates payment collection, and integrates with accounting software like QuickBooks and Xero. Stripe's intuitive interface and secure processing make it easy for firms to offer clients a professional and convenient payment experience.

Pricing

Stripe pricing ranges from 2.9% plus 30¢ per successful charge for domestic cards.

Free Trial

Stripe is free to get started and charges only for each successful transaction.



Process Automation

Zapier

Zapier is a no-code automation platform that helps accounting firms connect apps and automate repetitive tasks. By creating "Zaps" that trigger actions between tools like Slack, QuickBooks, and Google Drive, firms can save time and reduce manual effort. Whether automating client notifications or syncing data between systems, Zapier empowers firms to improve efficiency and focus on higher-value activities.

Pricing

Zapier's pricing ranges from \$0 to \$103.50 per month for 2,000 tasks.

Free Trial

Zapier offers a free 14 day trial with no credit card required.





Conclusion

Adopting the right technology is crucial.

The apps outlined in this guide address specific challenges firms face, from managing client communications to automating time-consuming processes.

By thoughtfully implementing these solutions, your firm can increase efficiency, improve client experience, and drive profitability.

Baby steps. Take the first category you feel most pain in – and select a solution that best aligns with your firm's goals and needs.

Ready to transform your firm with the right technology?

Finding the perfect apps for your accounting firm can be overwhelming—but it doesn't have to be.

We can help.

Schedule a free discovery meeting where we'll assess your firm's unique needs and recommend the best apps to enhance your efficiency, client service, and profitability.

During this session, we'll:

- Identify gaps in your current workflows.
- Explore app solutions tailored to your firm's goals.
- Outline an implementation plan to get you started seamlessly.

Don't let outdated apps hold you back. Schedule your discovery meeting today and take the first step toward a more productive, tech-enabled future!

