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Mobile CPAs

These days, there are many CPAs who are finding themselves on the go are using some of the latest phones with mobile applications to do a lot more than simply staying connected to their clients.

The answer was Smartphones, PDAs, and Netbooks in general, the Kindle, iPod touch, iPhone, and Blackberry devices such as The World Edition, Storm, and Bold.

The CPAs who responded said that they use these devices for the occasional sports update and crossword puzzle, as well as work related tasks such as access to their email. Most of them, however, stressed the importance of being able to schedule appointments while they were on the road and the ability to connect with colleagues and clients. In addition, they have started to use some applications on these devices for many work related tasks, including invoicing while working with clients who were outside the office and time tracking. In other words, mobile technology is saving money and time.

The CPA's PDA/Smartphone is his best friend when he is in the field. They allow him to make sure that he is connected from anywhere at any time. They permit all principals and partners to have their device connected to the corporate email service. This is currently the mail of these devices, but as more applications are being developed it will permit them to do even more.

The most obvious benefit of these devices is communication but new applications are making much more available. Some people are using their devices to edit their clients Excel spread sheets and Word documents as well as managing multiple email accounts. However, it is difficult to use these functions with such a small screen. There are even some applications that allow the people to speak what they want the phone to do, like search the Internet for an address or dial a client's number while driving.

Another useful application allows people to do timekeeping and keep track of how much time they spend with each client. A dictionary is also available which allows the CPA to explain a term they may be unfamiliar with, perhaps on a client's financial statement. Then there is the business calculator application that they can use to provide access to conversions, depreciation, bonds, and stocks.

Another device that some CPAs use is the Kindle, which allows them to listen to podcasts while they are driving and don't have to stop driving to write it down.

Because data security is always a concerns, with all of these devices in is important that they are password protected which prevents the client data from being exposed if a device is stolen or lost. Some CPA firms use a four digit password while others use an eight digit password that contain number and symbols as well as lowercase and uppercase letters.

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