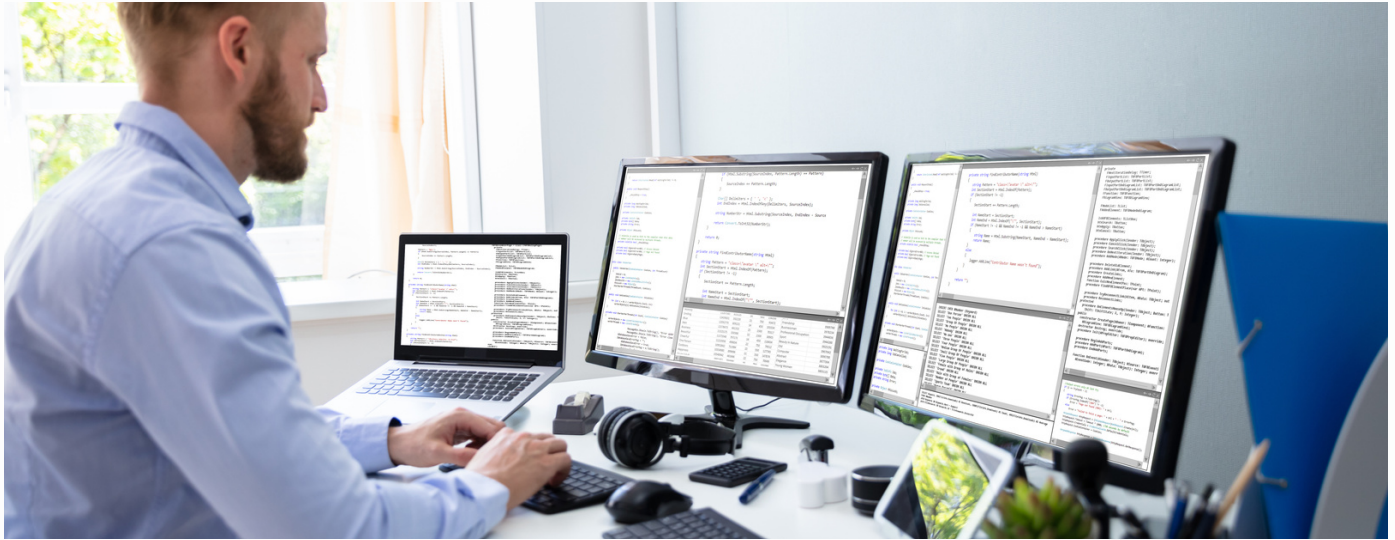


THE ACCOUNTING NOTE

OFFICIAL COMPANY NEWSLETTER OF
PLUS 1 TECHNOLOGY



INSIDE THIS FALL'S ISSUE:

WHAT ARE 4
TECHNOLOGIES YOU CAN
IMPLEMENT TODAY - 1

AM I SECURE? - 3

The technology newsletter for
Accountants

This monthly publication is provided courtesy of Marc Umstead, President of Plus 1 Technology.

Our Mission:

Plus 1 aims to help empower accounting firms with tools that boost productivity, efficiency, and reliability. Our goal is to take the stress out of IT through innovative solutions and services.



What are 4 Technologies you can implement today that will increase your productivity and cut your administrative costs.

WRITTEN BY MARC UMSTEAD

In our current economic cycle, where labor is tough to find and the workload is larger than it has ever been, it is critical to have technology solutions in place that can maximize your staff productivity and minimize administrative cost. Here is list 4 technologies that every accounting firm should have in place.

- Appointment setting solutions – If your firm is still calling, e-mailing, or sending postcard reminders to setup tax appointments, you need this solution now. These solutions allow your clients access to the company or individual preparer’s schedule to book a predetermined block of time to discuss their taxes. This solution eliminates all the back and forth that goes along with scheduling and allows the accounting firm to allow booking far in advance and even incentivize clients to book their appointments early.
- File/Date Portals – Every accounting firm should be using a file portal either provided by your Tax software or a third party such as Citrix ShareFile. This solution is not only necessary for the secure upload and download of documents, but it gives your clients a place to retrieve their returns without having to bog down your administrative staff with these requests.
- Modern Communication tools – This is a broader range of technologies but using modern communication tools is critical to not only interface with the younger generation but also to provide some resiliency in your infrastructure. Using a modern VOIP platform will allow your clients to text a company phone number (not your personal cell phone), enable all staff members to answer their work extension through an app on their cell phone, and allow inter-office chat capability.
- Multiple Monitors - To the users that have never used multiple screens, they often view it as excessive but users that have experienced the benefits often can’t live without them. Multiple monitors maximize productivity by allowing users to view different applications at the same time in full screen such as viewing client documents and entering data into your tax software

These are 4 critical technologies we believe every accounting/CPA firm should have in place before the beginning of next tax season. If you are looking to implement these technologies, please reach out to us.



- *“Plus 1 Technology provides recommendations and IT capabilities we would not even know were available. The recommendations are presented without sales pressure, just the pros and cons. The response time we have been provided exceeds that which we experienced with other firms. Plus 1 also works with planning for our budgeting process so we can plan and not react to our IT needs.”*

- Michael McGann, Manager, Lower Perkiomen Sewer Authority



Modern Phone System

Does your company have a modern phone system?

If you don't answer yes to all of these questions, you need a phone system upgrade!

1. Can you answer your business phone number from your cell phone?
2. Can you make calls from your business line from your mobile phone?
3. Can you pick up your desk phone and plug it into your home network and have it work with no configuration?
4. Can you text from your business phone number?

Learn more or obtain a free quote today here:

<https://plus1technology.com/voip/>

Free Cyber Security Audit Will Reveal Where Your Computer Network Is Exposed And How To Protect Your Company Now

At no cost or obligation, our highly skilled team of IT pros will come to your office and conduct a comprehensive cyber security audit to uncover loopholes in your company's IT security.

After the audit is done, we'll prepare a customized "Report Of Findings" that will reveal specific vulnerabilities and provide

a Prioritized Action Plan for getting these security problems addressed fast. This report and action plan should be a real eye-opener for you, since almost all of the businesses we've done this for discover they are completely exposed to various threats in a number of areas.

To get started and claim your free assessment now, visit www.IT4MyBusiness.com/csra

Am I Secure? The cybersecurity solutions you must have in place to answer YES!

WRITTEN BY MARC UMSTEAD

Many firms have seen the recent cyber security headlines or were given a 10-page questionnaire when they went to renew/order cyber insurance. One thing is for certain, and that is you can't hide anymore. More and more of the public is aware of cyber security protocols and the number of cyber attacks are growing daily, so putting your head in the sand is no longer an option. Here are some technologies you must have in place to truly be secure.

2FA/MFA - No one likes these solutions, but they do a great job at securing your accounts and should be used on every account you have.

Professional email - You can't use a carrier provided (Comcast, Verizon, AOL, or Yahoo) account for your business communication. Not only does it look unprofessional, but it is! The security on these accounts is very simplistic and you can't verify any type of compliance using these accounts.

Cybersecurity Awareness Training - Most cyber insurance companies require that you have at least an annual training completed by your staff. Some insurance companies will also ask for ongoing or more frequent training. These solutions are a great way to keep your staff informed on the risks out there and how to spot them.

Account monitoring - Does someone have access to your email account right now? You probably answered No, but how would you know? Using a SOC (Security Operations Center) to monitor your email and cloud accounts is a great way to ensure if someone is trying to gain access to your accounts, you are made aware. These solutions monitor your accounts 24/7/365 and check for anomalies.

Next-Gen Endpoint Protection - The days of buying an off the shelf anti-virus from your local office supply store and believing that will protect you from modern malicious actors is over. Every company needs a next generation protection suite that can spot not only known threats but ones that may not be discovered yet.

A trusted technology partner - All of these solutions require an experienced team to manage, implement, and report the findings of these solutions. We recommend every business work with an MSP to manage their cyber security.

If your company has all of these items implemented, you should be in great shape. If your firm needs assistance implementing any of these solutions, feel free to reach out to us.

What is the Cloud? How can it help me?



Over the past 10 years or so "the cloud" has become a somewhat vague technology term that often confuses business owners. One simple way to think about the cloud is simply "someone else's computer". Using the cloud simply means you are renting space or processing power on a server in a datacenter that isn't located on your premise.

There are a number of cloud based services that can be of use to an accounting firm:

1. Quickbooks data file hosting
2. E-mail services
3. Cloud based Document storage
4. Cloud based Application Servers

Read the whole
article
here:



SCAN ME



Accountant Excel Functions

- ABS: This function converts a number (negative to positive) into an absolute number.
- SUMIFS: With this function, you can sum values from an array using multiple conditions.
- AVERAGEIFS: With this function, you can average values from an array using multiple conditions.

HAPPY HOUR

GINGER & PEAR BOURBRON SPLASH

This Ginger Pear Bourbon Cocktail is a perfect way to celebrate early fall! It's fruity and slightly sweet with notes of warm ginger and a generous splash of smooth bourbon!



- 2 ounces Bourbon
- 2 ounces Pear Nectar or Juice
- ½ Lemon – juice
- 1 ounce Ginger Honey Simple Syrup
- Ginger Ale , to taste
- Ginger Honey Simple Syrup: (enough for 2 cocktails)
- ¼ Cup Honey
- ¼ Cup Water
- 1 1" piece of Ginger – peeled and thinly sliced

- Make the simple syrup: In a small saucepot combine honey, water and ginger. Bring to a gentle simmer over medium heat, stirring, until honey dissolves into water. Remove from heat and set aside to steep for 20 minutes. Strain into a container, discarding ginger, cover and refrigerate until ready to use.
- For the cocktail: Combine bourbon, pear juice, lemon and simple syrup in a cocktail shaker with ice. Vigorously shake until chilled.
- Pour over ice in glass and top with a bit of ginger ale. Garnish with pear slices, a lemon wedge and a few pieces of crystallized ginger on a skewer.



3277 W Ridge Pike Suite B201
Pottstown PA 19464

Inside This Issue

What are 4 Technologies you can implement today- 1

Modern Phone Solution - 2

Am I Secure? The cybersecurity solutions you must have in place to answer YES! - 3

What is the cloud? - 3