Cindy Craig
CalCPA Forensic Services Section request:

TECHNOLOGY TIPS, TRICKS AND TOOLS

There have been some excellent presentations at FVS meetings and at CalCPA Conferences on the subject of technology and how it can help us. The pace of change can be overwhelming and learning from colleagues about tips, tricks and tools that have helped them is great. Is there an interest in the group to share some of that information via this platform?

Some general topics I'd love to see addressed:

1) Who is using an iPad (or other tablet) regularly for business? What are the benefits of this tool versus a laptop or notebook? What apps have you found indespensible?

2) Who accepts credit card payments and what is the technology you use for accepting them? Do you like it?

3) Documents with confidential information (ex. ssn's): How are you sending documents that contain confidential information? Do you redact it and then email it? Do you password protect it before sending it? Are you using an encrypted email service? Do you upload it to the cloud (i.e. Dropbox)? Other?

4) Encrypted thumb drives: when copying client information to a thumb drive to take with you, do you save it to a regular thumb drive or an encrypted one? If encrypted, what one do you use? I've queried colleagues and the following three brands were recommended:

* Kingston Technology 4 GB DataTraveler Vault Privacy
* Google Ironkey USB drives
* Kanguru

4) Technology trip-ups: has anyone had their use of technology blow up on them? This is the "horror story" side of things. Something seemed like a great technological idea only to have it result in....a lawsuit? destroyed files? Angry client? Other????

Those are some initial thoughts. This is a great network of professionals and I'd love to share among us on the technology-side of our practices. Don? Jeremy? Others?

Following are apps I have on my phone that I use and like or that have promise, I just forget about them. Any favorites others have to share? Hoping to get some technology dialogue going in the group...

NEWS/INFORMATION
Both of these apps let you design content and both also expose me to content I wouldn't

necessarily find on my own, which I like
* Zite
* Flipboard

PLAY/ENTERTAINMENT
* Words with Friends
* Luminosity's Brain Trainer - haven't tried this yet but it looks interesting
* Photosynth - for stitching together individual pictures into one, long picture
* Pandora - for listening to music; lots of self-created stations.
* SoundHound - for identifying a song I hear that I don't know
* Sketchbook - for doodling

UTILITY
* Wunderlist - To Do list
* Evernote - for tracking all sorts of things, including serial numbers on my equipment. an save pictures, documents, notes, articles...pretty much anything.
* Dragon Dictation - I forget it's there and I know others who swear by it; dictate your email, clean it up, and then send it
* Dragon Go - say what you're looking for and Dragon Go pulls up results from the following search sites in a format that makes it easy to quickly peruse: Google, OpenTable, Yelp, YouTube, Twitter and Wikipedia
* CamCard - read good reviews of this for getting business cards into your contacts; I'm squeamish about giving apps access to my contacts, so I haven't actually tested it
* Pocket - a "read it later" app for saving all those articles I don't have time to get to now. And rarely ever do, but I feel better knowing they're there.
* iTip - when you're asked, because you're a CPA, to figure out how much the total restaurant or bar tab should be with tip and how to divide it among a group, this is slick.
* Genius Scan - take a picture of a document, the app converts it to a pdf or jpeg, and you can email it, save it, print it, send it to Box or Dropbox.
* Onavo Extend - when you're not on WiFi, this extends the capacity of your data plan by, it says, compressing your data usage.
* Fast Customer - Need to call customer service and can't stand being stuck on hold? Call them via this app, hang up, and the company calls you back. I've used the app a couple of times, with enough success to use it again in the future.
* Intuit Blog - I like seeing their posts, in particular on technology. The technology section currently has "6 email apps to help you manage your inbox" and "5 free alternatives to Microsoft Office." I've learned about new apps through this; it's clean and gets to the point quickly.

Any recommendations out there from others?