

WGS CPA Portal vs TaxDome

Feature-by-Feature Comparison for CPA Firms

See how WGS CPA Portal stacks up against TaxDome across every major capability.

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Client Management

Feature	WGS CPA Portal	TaxDome
Client intake form	✓	✓
Filing status tracking	✓	✓
Custom fields	✓	✓
Bulk client actions	✓	X
Client status pipeline	✓	✓
At-risk client alerts (AI)	✓	X
Dependent & spouse tracking	✓	✓

Document Management

Feature	WGS CPA Portal	TaxDome
Secure cloud storage	✓	✓
Document categories	✓	✓
Folder organization	✓	✓
AI document analysis	✓	X
AI data extraction	✓	X
E-signature requests	✓	✓
Signature audit trail	✓	✓

Client Portal

Feature	WGS CPA Portal	TaxDome
Branded portal	✓	✓
Password-free magic links	✓	X
Client document upload	✓	✓
Tax organizer questionnaire	✓	✓
Case status tracker	✓	✓
Portal e-signature	✓	✓
Custom welcome message	✓	✓

Communication

Feature	WGS CPA Portal	TaxDome
Two-way SMS (Twilio)	✓	X
SMS templates	✓	X
In-app team chat	✓	X
Email notifications	✓	✓
Deadline reminders	✓	✓
Missing doc reminders	✓	X

Task & Workflow

Feature	WGS CPA Portal	TaxDome
Task board with priorities	✓	✓
Task assignment	✓	✓
Calendar view	✓	✓
Time tracking	✓	✓
Billable hours tracking	✓	X
Deadline notifications	✓	✓

Reporting & Admin

Feature	WGS CPA Portal	TaxDome
Client status reports	✓	✓
Revenue analytics	✓	✓
Staff workload reports	✓	X
Data export (CSV/PDF)	✓	✓
Role-based access (RLS)	✓	✓
Staff invitation system	✓	✓
Single-tenant isolation	✓	X

AI-Powered Advantage

WGS CPA Portal includes built-in AI capabilities at no extra cost — document analysis, data extraction, tax suggestions, and at-risk client detection. TaxDome offers no native AI features.

Ready to switch? Call (609) 383-7406 / (732) 277-5642 or email marketing@worldgroupsolutions.com