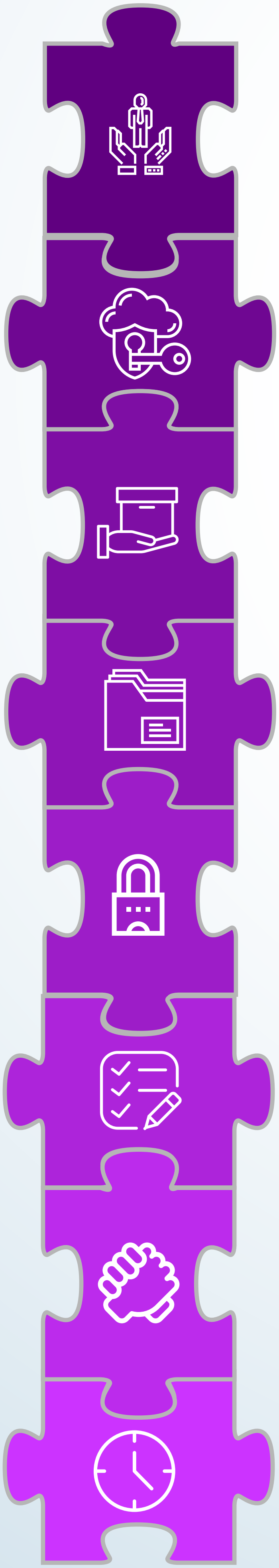

Empower Your Sales Staff

Give our salespeople a tool that keeps them up to date on who to call, when to call, and why they are making the call, i.e., initial sales call, follow-up call, or schedule an appointment, etc.

Access Client Data

Track your clients from the day they make first contact with your firm. You are also able to track the version of QuickBooks and all of the add-on services that you are able to sell them. Have every bit of information you have ever collected from them or generated for/about them at your fingertips.

Track New Prospects

What products do they think they need? What products do they actually need? What additional services will they need in the future, etc.?

Record Firm Data

Create, track, and update informational records essential to the smooth functioning of your firm; i.e., that phone number you keep losing.

Record Login Data

Track / access client login / password data from anywhere, anytime.

Track Client Tasks

Track ongoing activities being performed by your firms, such as bookkeeping, support calls, onsite visits, etc.

Support Portal

Allow your clients to be able to enter support tickets directly into your system without having to pick-up the phone.

Create Time Sheets for You and Your Employees

Track billable time and export it directly into QuickBooks. This includes time spent onsite with clients, support telephone calls with clients, or any other billable time.