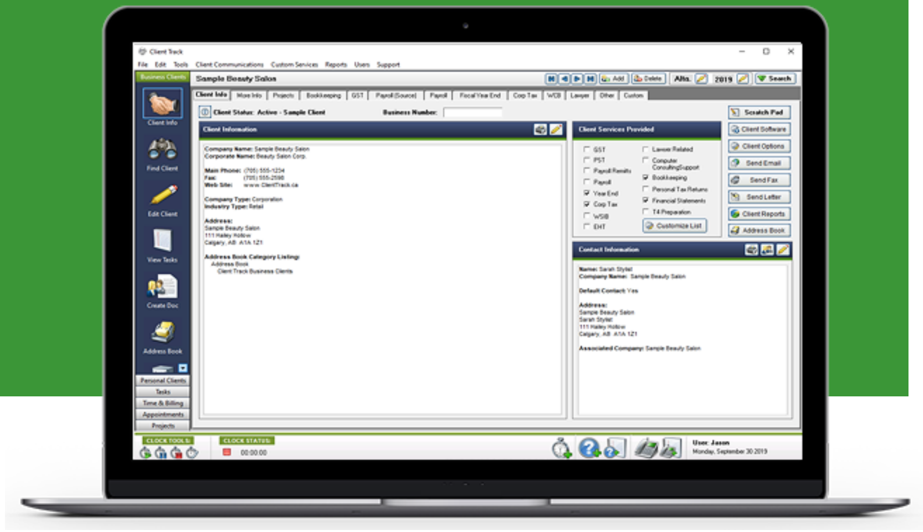
CLIENT TRACK

TAKE CONTROL OF YOUR PRACTICE

MANAGEMENT SOFTWARE SOLUTION FOR ACCOUNTING PROFESSIONALS

Operating an efficient, well organized business means that each staff member must have the information and tools they need at their fingertips



IN A PERFECT WORLD…

- You would get all of the complete information you need from clients
- ON TIME
- Be 90% productive
- Have very few distractions

IN THE REAL WORLD…

Clients introduce virtually all of the inefficiencies that prevent you from being productive.

- Bring information at the last minute
- Give incomplete information
- Call / make demand of your time

MANAGING YOUR CLIENTS

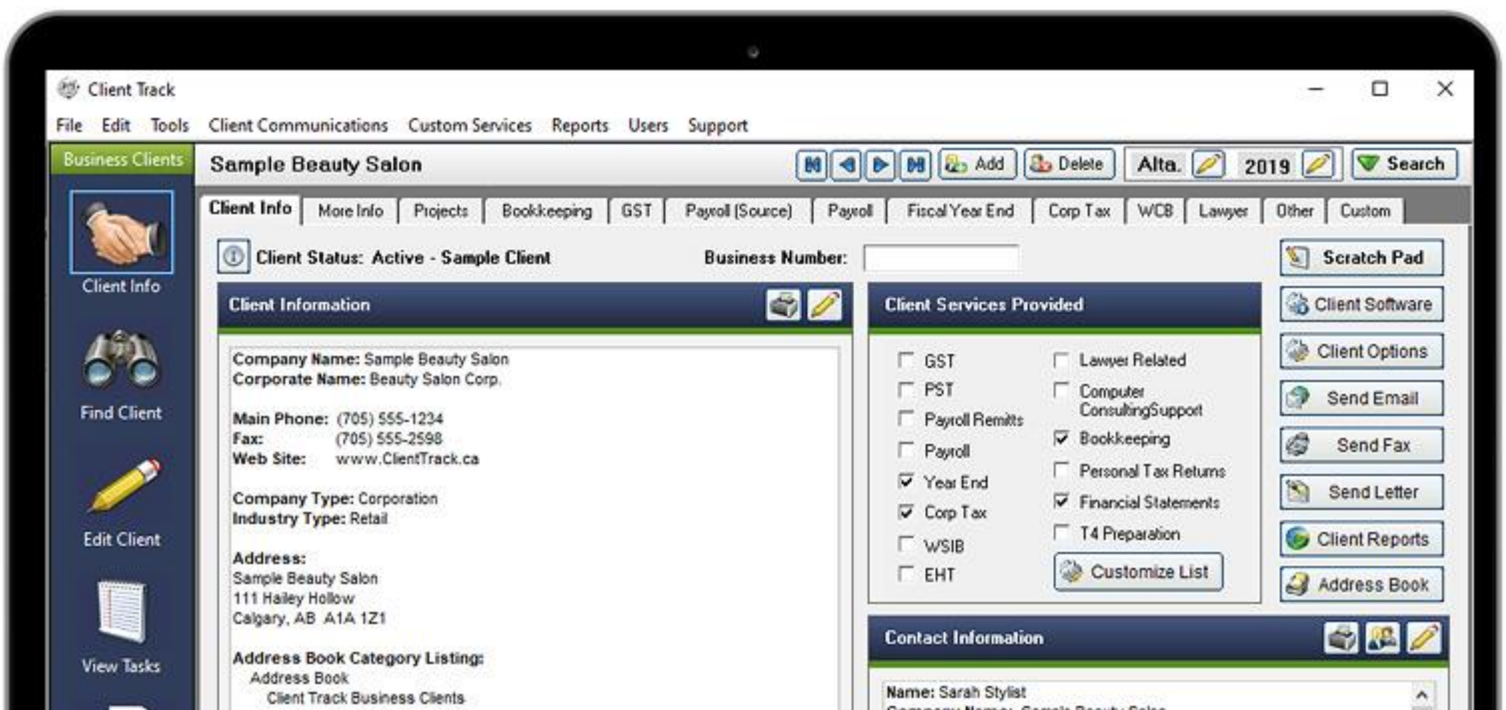
- **We understand…** that your clients don’t like doing their bookkeeping
- **We understand…** that your clients need repeated reminders and ‘calls-to-action’ to prevent them from bringing their information at the last minute
- **We understand…** that your clients often bring incomplete information and need to be chased all over again
- **We understand…** how frustrating that it is to repeat this process with your clients each month

USING CLIENT TRACK TO CREATE A BETTER PRACTICE

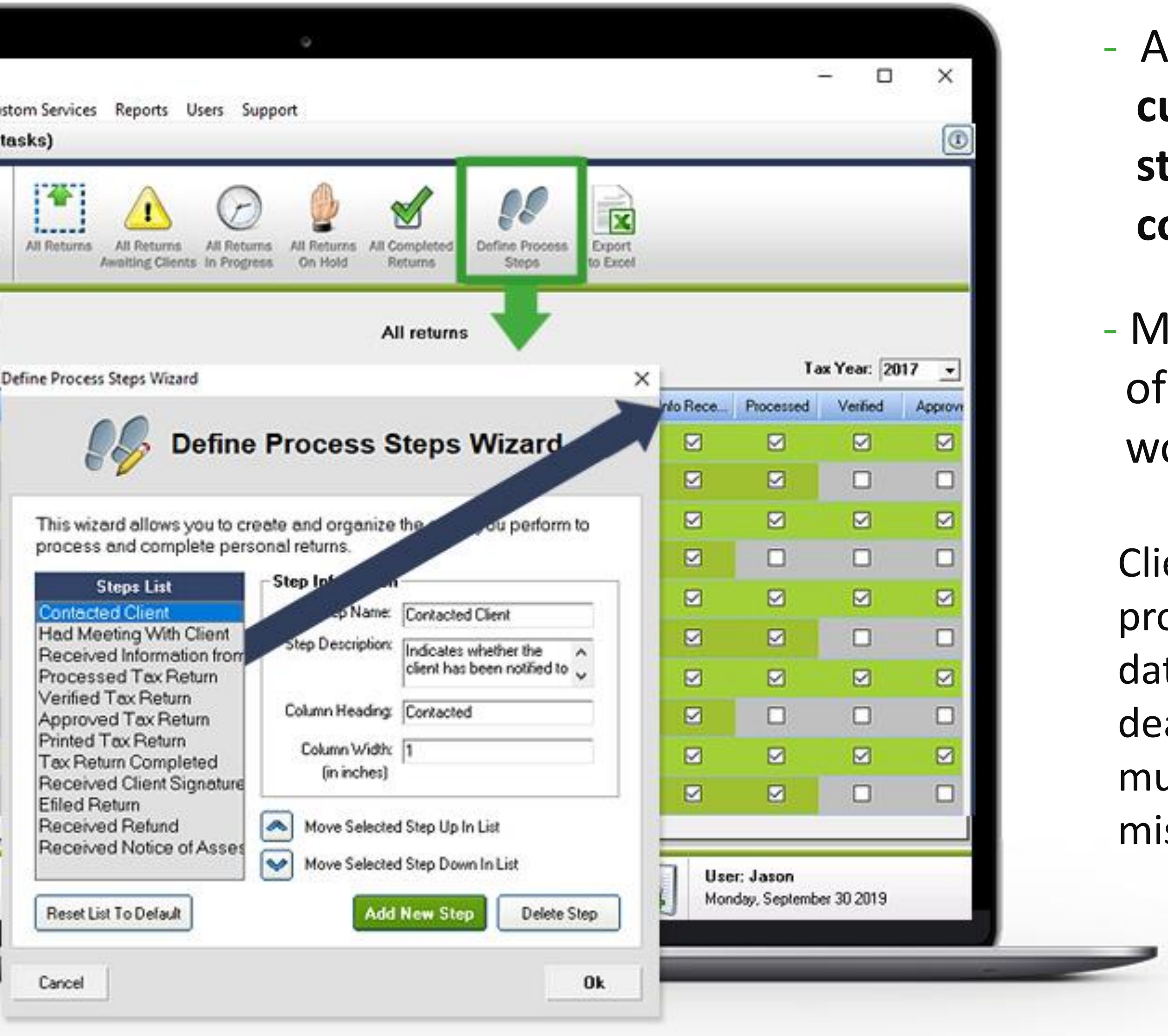
CLIENT TRACK FEATURES

CLIENT INFORMATION

- **Full Client CRM with over 200 information fields**
- Have all of your clients' information in one location so everything you need is at your fingertips



TASK & PROJECT MANAGEMENT



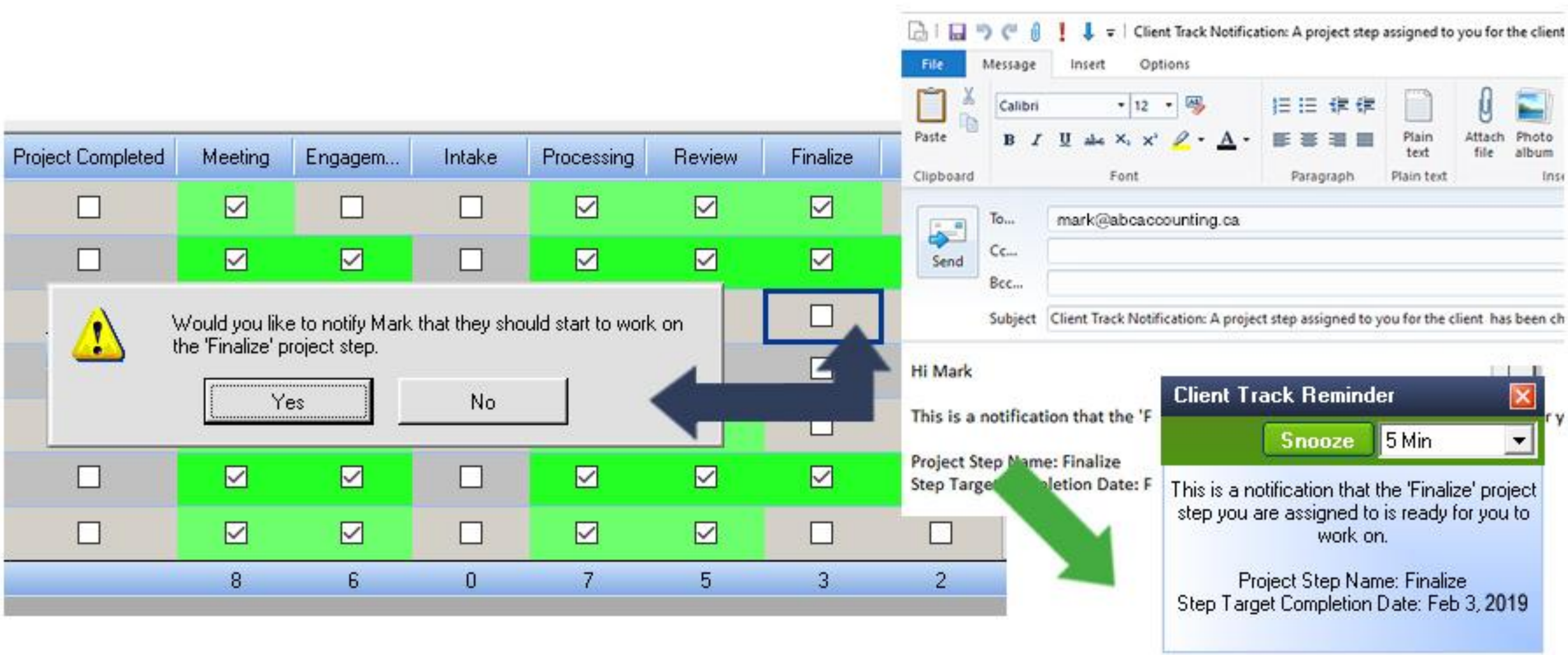
- Ability to **define and customize number of steps required to complete a return**

- Manage and view all of your tasks and workload at a glance

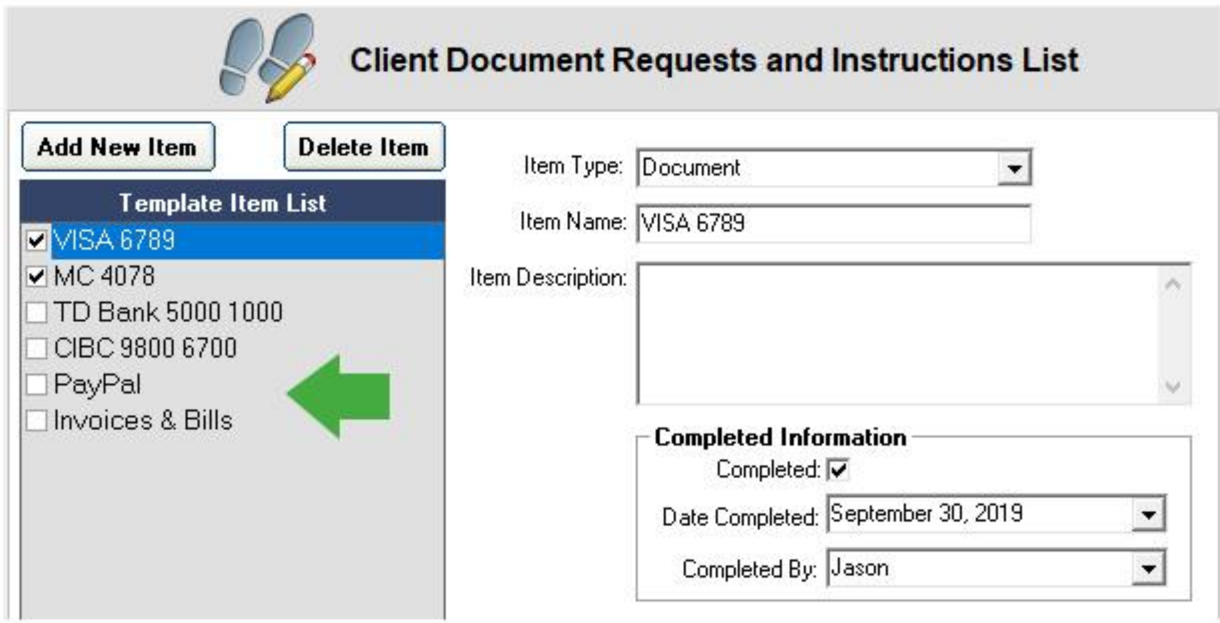
Client Track has built-in provincial and federal due dates which makes scheduling deadlines for your clients much easier and you won't miss a deadline again!

INTERNAL STAFF NOTIFICATION FOR UPCOMING TASK DEADLINES

Client Track can notify you and your team members when you need to work on certain tasks and steps by email or popup notifications



RECORD & TRACK PAPERWORK YOU NEED FOR EACH DEADLINE

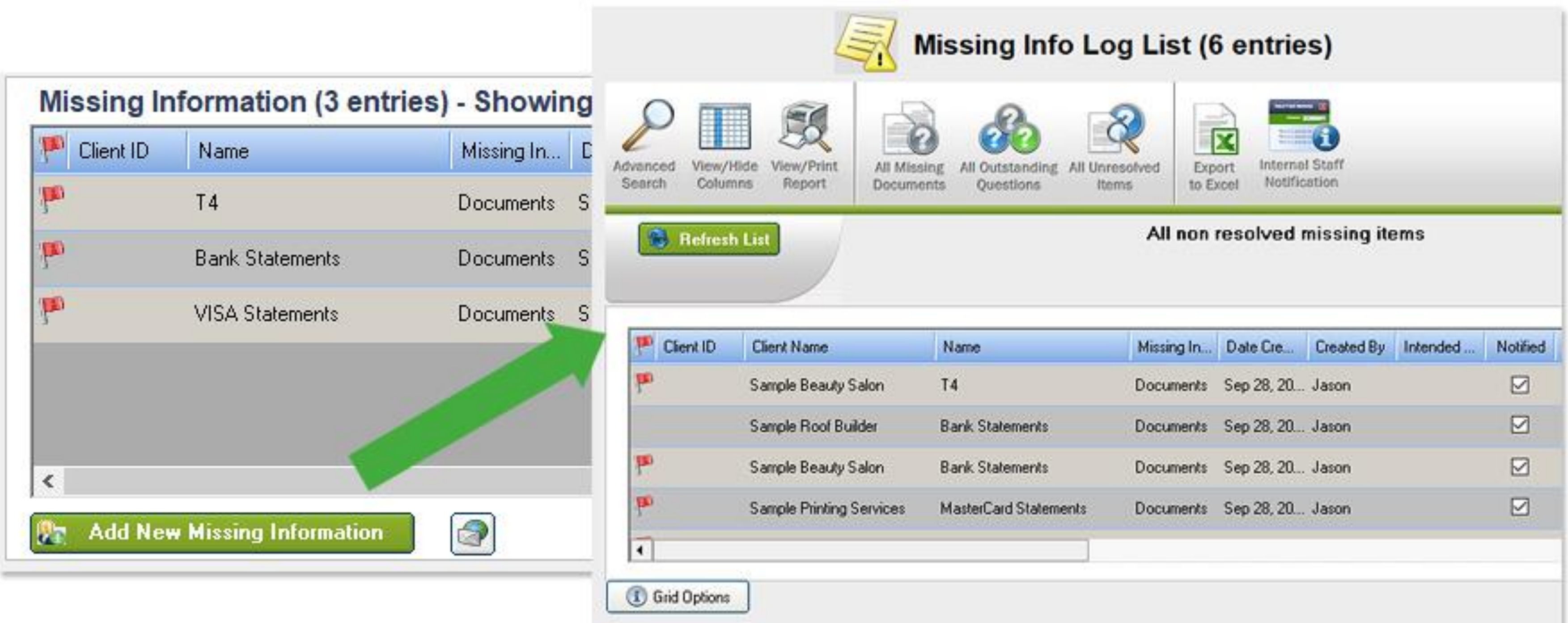


When the client brings in the paperwork, whoever receives it can now verify that everything required as been brought in

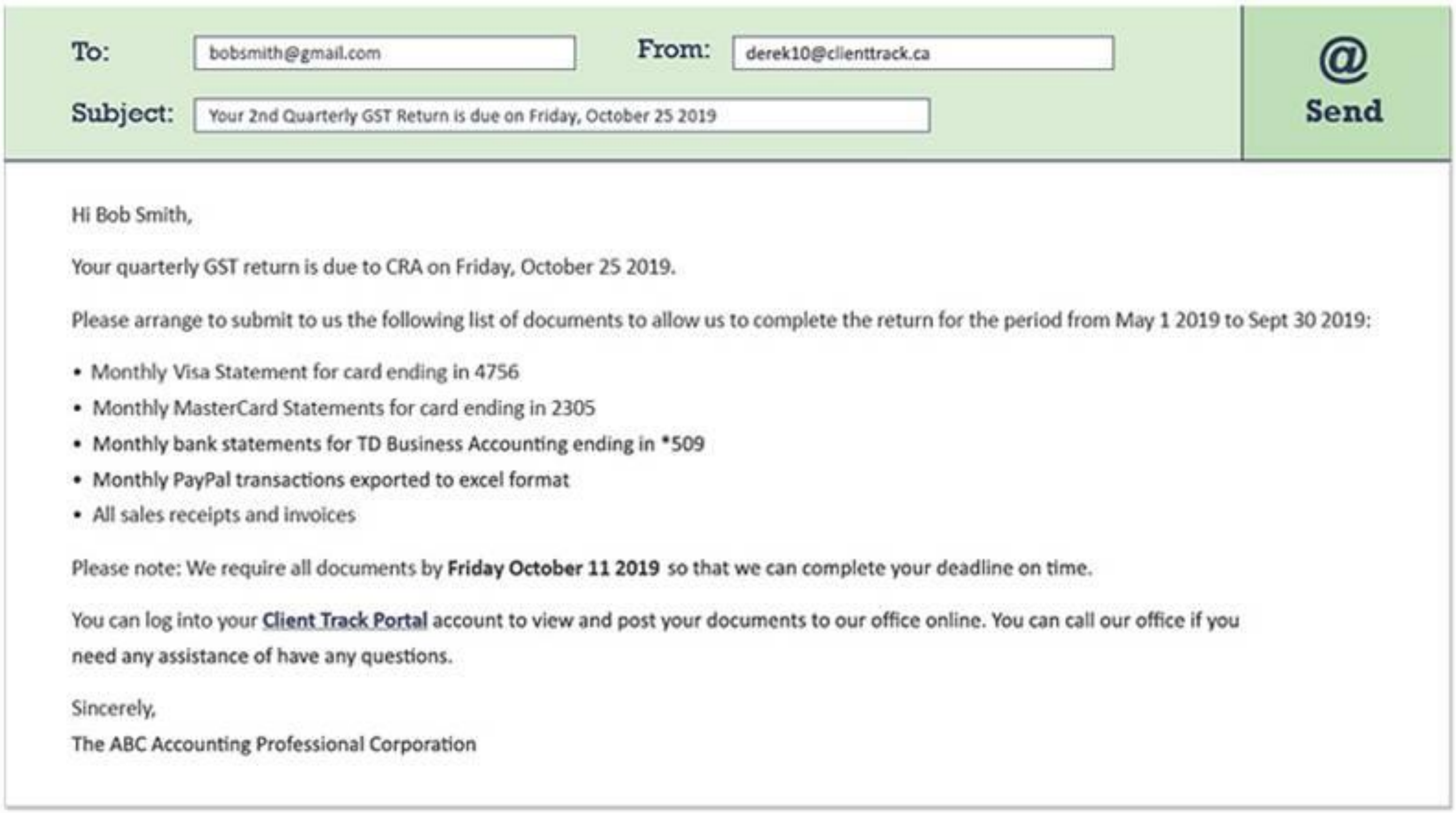
MANAGE AND TRACK YOUR CLIENTS' MISSING INFORMATION

- Easily track and record exactly when you receive your clients' paperwork clients and can also record any missing information

- Record any questions preparers may have for the client



AUTOMATICALLY SEND EMAIL REMINDERS TO YOUR CLIENTS



To: bobsmith@gmail.com

From: derek10@clienttrack.ca

Subject: Your 2nd Quarterly GST Return is due on Friday, October 25 2019

@ Send

Hi Bob Smith,

Your quarterly GST return is due to CRA on Friday, October 25 2019.

Please arrange to submit to us the following list of documents to allow us to complete the return for the period from May 1 2019 to Sept 30 2019:

- Monthly Visa Statement for card ending in 4756
- Monthly MasterCard Statements for card ending in 2305
- Monthly bank statements for TD Business Accounting ending in *509
- Monthly PayPal transactions exported to excel format
- All sales receipts and invoices

Please note: We require all documents by **Friday October 11 2019** so that we can complete your deadline on time.

You can log into your Client Track Portal account to view and post your documents to our office online. You can call our office if you need any assistance of have any questions.

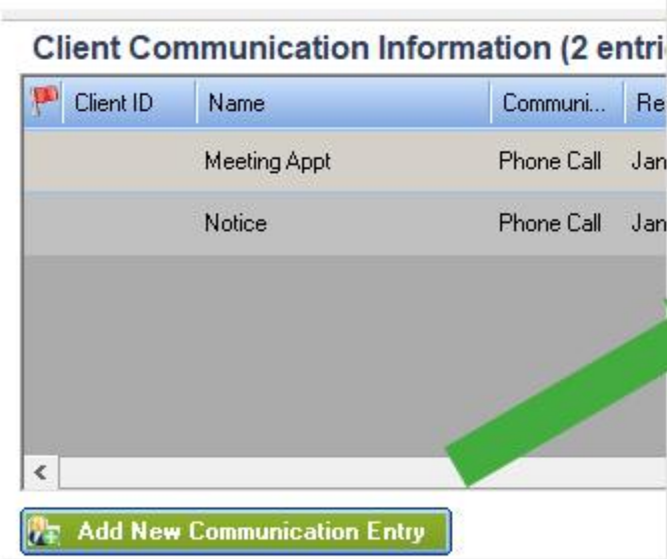
Sincerely,
The ABC Accounting Professional Corporation

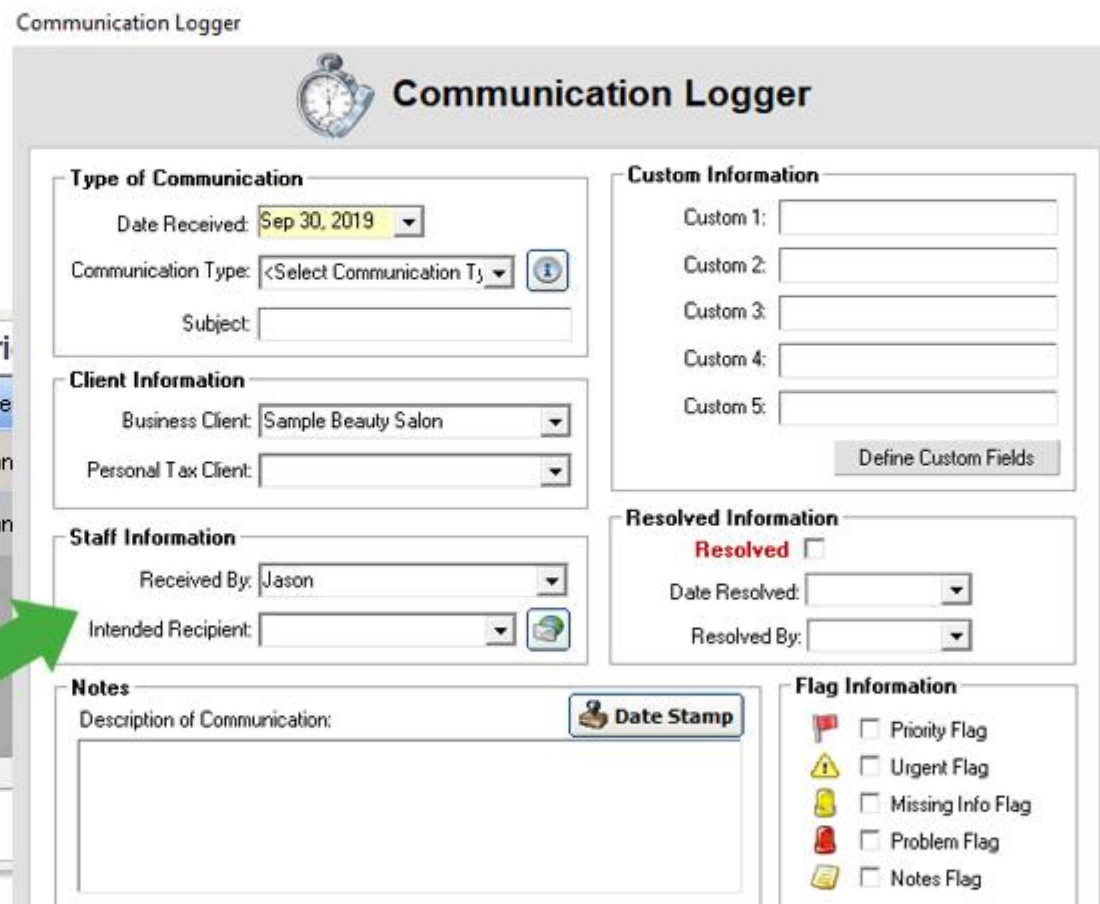
Customized email notification templates

RECORD AND DOCUMENT ALL OF YOUR IMPORTANT CONVERSATIONS

- Assign tasks and duties to other staff based on incoming communications so everyone knows what they need to do

- Allows you and your staff to log all phone calls and client communications





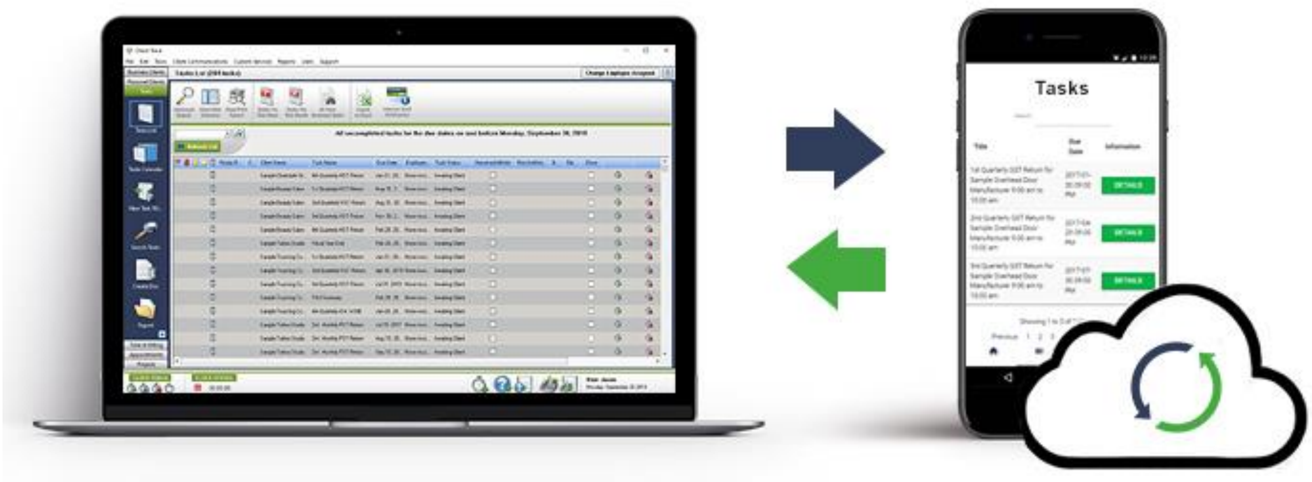
FULL TIME TRACKING AND AR REPORTING

- Use timers and manual time entry to provide accurate recording of time spent on clients' tasks
- Track account balances and productivity levels for your clients, staff and projects

HARNESSING THE POWER OF THE INTERNET

CLIENT TRACK PORTAL

Client Track Portal is an **optional cloud based add-on that works with our existing Client Track** desktop software so that you can access your information on the go through a browser based portal or a phone app.



CLIENT TRACK
(Desktop)

CLIENT TRACK PORTAL
(Cloud-based add-on)

WHAT'S NEW

CLIENT TRACK PORTAL

- Access the Client Track Desktop remotely
- Use your phone or any browser

SECURE EMAIL SENDING

- Send Secure Encrypted emails
- Up to 2GB of multiple file attachments

CLIENT ACCESS & FILE SHARING

- Clients access a secure cloud based shared document storage system
- You and your clients view and store files securely online

TASK AND TIME & BILLING PRICING

# Licences	Client Track & Portal Bundle	Client Track Task and Time & Billing Ed.	Portal Cloud-based Add-On
Up to 2 Users	$39 /mth	$29 /mth	$29 /mth
Up to 5 Users	$59 /mth	$39 /mth	$39 /mth
Up to 9 Users	$119 /mth	$89 /mth	$89 /mth

***** All prices above is per monthly fees *****

Visit our website at www.ClientTrack.ca for more pricing options, including to pay annually

Client Track understands your needs, unique pressures and challenges in the accounting industry. We've developed a software solution that's intuitive and works the way you do.

Free live demo(s) with support representative:

www.clienttrack.ca/support/demo.html

1-866-423-8525 | **sales@clienttrack.ca**

30-DAY FREE TRIAL

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