Integrated Solutions

CRM DOCTOR

Account Management CRM

What is Account Management CRM?

Account Management CRM focus on primary objectives understanding the client requirement, retaining client and creating the recurring opportunities.

Try to accomplish the client's goal with an objective of hurdle free process by reducing stress of scheduling task, missing out priorities and maintaining the records.

Target Audience

Application helps Accounting, Payroll & Taxation and Financial Service Providers, Project Management for any Self Managing Organizations.

Why Account Management CRM?

Managing and tracking of the recurring work is in progress with Key Accounts/Clients

Practice to Organize your Jobs, Schedule task, Get the status on the Job through collaborating with teammates

"We couldn't have grown from just me to a 40-strong team if it wasn't for Account CRM."

-Jen Marc

Why Account CRM?

- Automate with workflows all your Projects
- Drill down the Information related to your customer Accounts.
- Account Management helps to track all your email communication, project progress with your clients
- Get all the due/pending Tasks scheduled details Over Dashboard
- Status of the Jobs in Graph
- Calendar management

Features – Loved by Our Customers

- Prospect Management
- Client Management
- Project Templates
- Task Scheduling
- Task Dependency
- To-do List Management
- Recurring Job Management
- Job Management
- Document Management

PROSPECT MANAGEMENT

Prospect management is a process in which incoming Prospects are qualified, analysed, and nurtured so that they can be converted into new business opportunities.
In any sales process, Prospects from multiple sources enter your Prospect management system, and the sales-ready Prospects are converted into opportunity.

CLIENT MANAGEMENT

Efficiently manage all your client details in secure cloud. At one window you can see all the past interactions, jobs handled for the client, related documents, events, tasks.

PROJECT TEMPLATES

A template is standardized checklist for the work that you do for many clients. It is a tool to create jobs. If you create a job using template, all the tasks are populated in the job.

TASK SCHEDULING

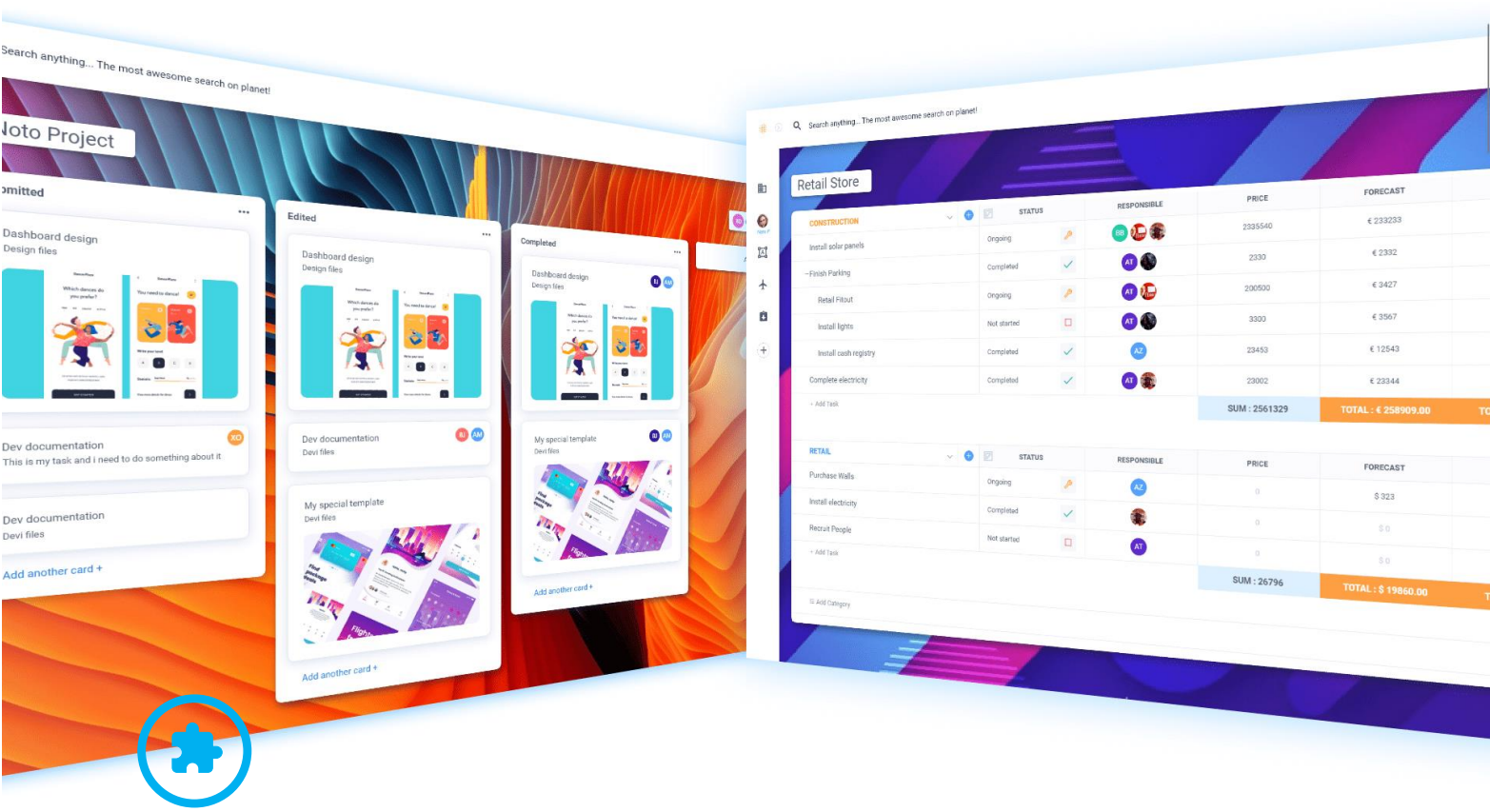
Efficiently assign your tasks to staff. create tasks directly in calendar. It means the right person turns up for the right job at the right time.

TASK DEPENDENCY

Never miss a scheduled maintenance job ever again. Automatically set up job ever again. Automatically set up periodic or routine maintenance tasks for clients at predefined intervals – weekly, monthly, annually. On the set date, the job will be automatically placed in your current task list.

TO-DO LIST MANAGEMENT

Organize your tasks lists and reminders and Keep track of your progress
Get a clear overview of all the tasks on dashboard and never lose track of an important task.



RECURRING JOB MANAGEMENT

Projects in Accounting work has to be repeated Monthly, Quarterly, Half yearly, Yearly. To create a repetitive Jobs - every time is a tedious task. Solution in Biztechnosys Account CRM is possible. You can have the Project auto creation based on repetition type. While creating a job by selecting month as repeat type, through the workflow same job based on repeat type is created. On selecting monthly as repeat, it will create a job automatically every month as per the scheduled date.

HOW CAN I STOP THE REPETITION OF JOBS AFTER SOME TIME?

To change the repetition type is possible as a one time for latest job, which had been created through workflow. Type of jobs repeated for consecutive year through workflow can be stopped manually.

JOB MANAGEMENT

DOCUMENT MANAGEMENT

- Sharing & saving of the Documents made easy.
- Get unlimited related document access.
- Secured way to share Confidential documents
- Manage the day-to-day Operations
- Seamlessly track every job from initial contact to final invoicing.

CHOOSE THE

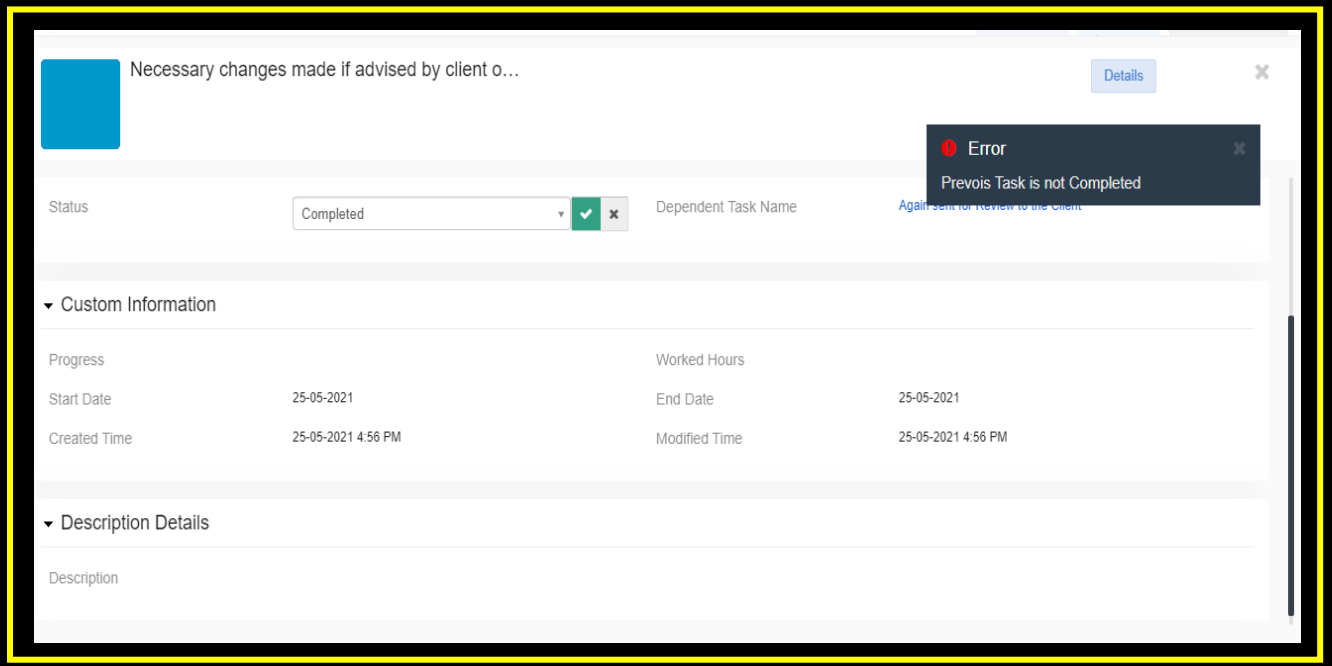
BEST CRM

Stress-Free

Accounting,
Payroll & Taxation
Project Management

CODE-LESS

Customization



Personalized Templates :: Create & Configure based on Task dependency

TOOLS	*Service Name	
	Again sent for Review to the Client	
	Necessary changes made if advised by client over e	
	Payroll Process	✓
	Confirmation Received from Client	✓
	Proceed with the Preparation of lodgement i.e expe	✓
	Send Final Payslip	
	Draft Payslips and other required reports sent to	✓

Account CRM is different.

Industries that have been busy providing the services to every company - from inception of the organization and running the same in a smooth way are Financial and Accounting service providers. Financial and Accounting companies want to be organized and scheduled tasks are performed in time, so that company can retain their clients and have the growth in their Accounts without any hassle.

Why our Account Management CRM is different?

- Team Collaboration
- Assigning task with your own predefined checklist template
- Able to organize quickly all your checklist in one location
- We help you to prioritize the tasks in a simple and easy manner, which will make sure that never miss out on your critical deadlines which are set
- Keeping track of the team, who has been assigned the task, what is needed to work on the next task, and tracking the progress
- We support and provide training to the entire team as per the request
- Helping the Financial and Accounting service providers to grow and have a loyal customer base in their firm

We Work with...

Account Management CRM works with the integration of apps, where you are spending less time to manage with in the software. our CRM is available to integrate with other vendor services, which you would like to use every day.

The most popular integrations, which we have done. Popular business applications are

Email Integration

AMAZON SES

(EMAIL MARKETING)

Accounting Integration

QUICKBOOKS

AND XERO

Payment Gateway Integration

STRIPE, PAYPAL