



Client Track

www.ClientTrack.ca

Let **Client Track** help you take
control of your practice.

INTRODUCTION

CLIENT TRACK 5.0

- **Saving money is about spending less time on determining what needs to be done and spending more time doing your work.**
- **It is estimated that the average accounting practice collectively spends four hours a day in non-billable time doing the following :**

INTRODUCTION

CLIENT TRACK 5.0

- Saving money is about spending less time on determining what needs to be done and spending more time doing your work.
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Searching for information

INTRODUCTION

CLIENT TRACK 5.0

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- It is estimated that the average accounting practice collectively spends four hours a day in non-billable time doing the following :

Trying to determine what needs to be done

INTRODUCTION

CLIENT TRACK 5.0

- Saving money is about spending less time on determining what needs to be done and spending more time doing your work.
- It is estimated that the average accounting practice collectively spends four hours a day in non-billable time doing the following :

Determining who's working on it

INTRODUCTION

CLIENT TRACK 5.0

- Saving money is about spending less time on determining what needs to be done and spending more time doing your work.
- It is estimated that the average accounting practice collectively spends four hours a day in non-billable time doing the following :

Figuring out where the problems are

INTRODUCTION

CLIENT TRACK 5.0

- **Client Track provides the solution you've been waiting for. Client Track tells you exactly what is due and when.**
- **Can track what projects your staff is working on and automatically notify your clients of upcoming deadlines.**

INTRODUCTION

CLIENT TRACK 5.0

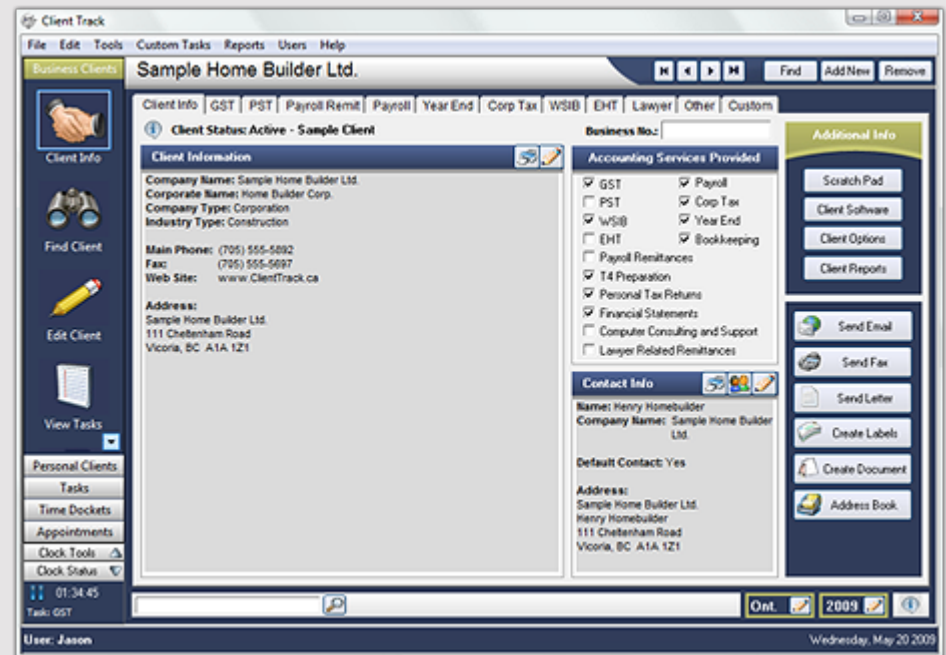
- **Client Track provides the solution you've been waiting for. Client Track tells you exactly what is due and when.**
- **Can track what projects your staff is working on and automatically notify your clients of upcoming deadlines.**
- **Streamline all of your office management tasks into one easy-to-use package**
- **Client Track is designed specifically for Accounting Professionals, so we take care of everything for you.**

FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Client Information

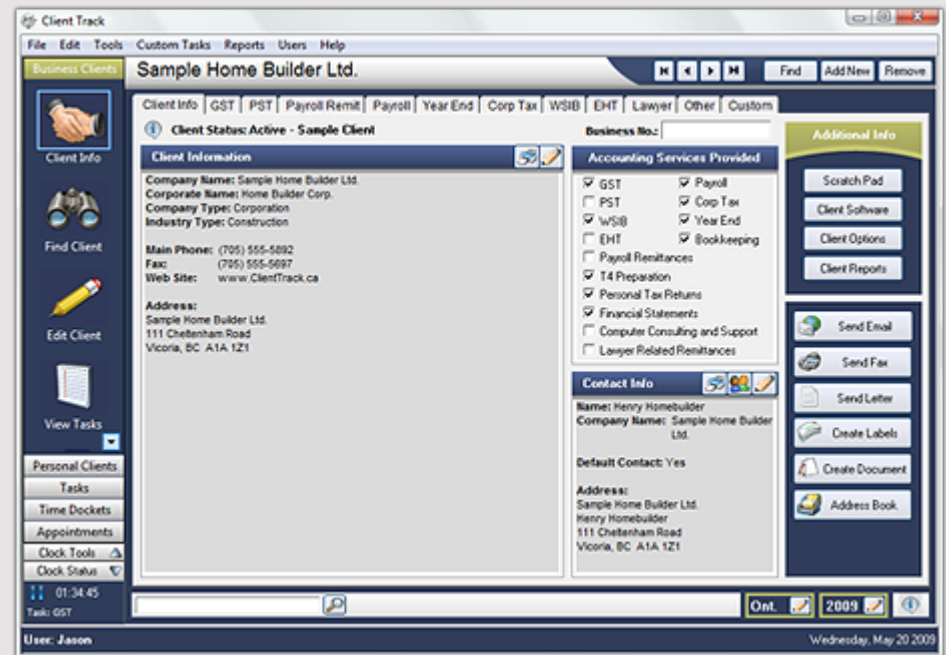


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Client Tasks

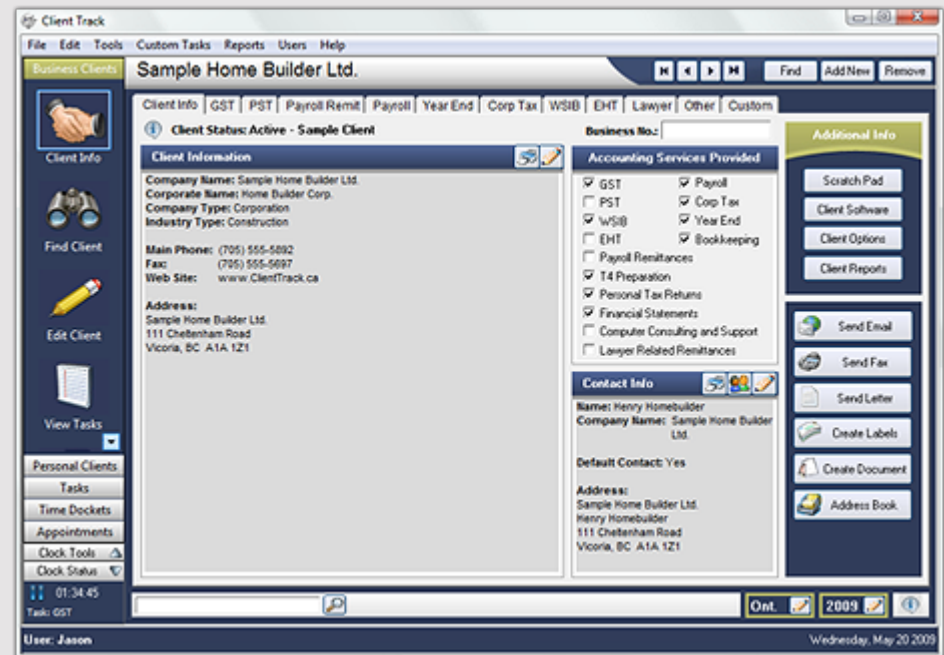


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Client Notification

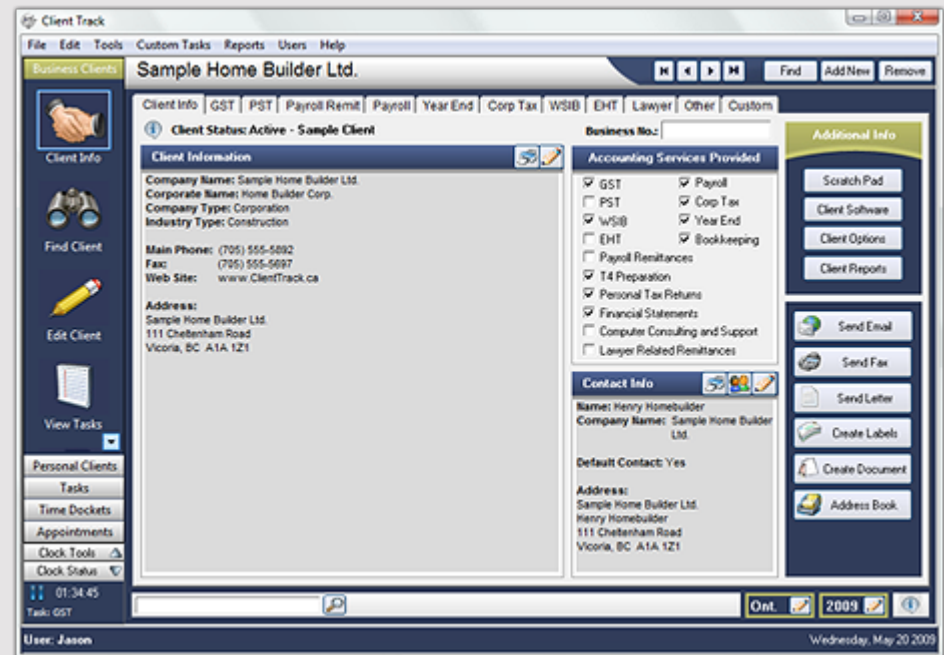


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Personal Tax

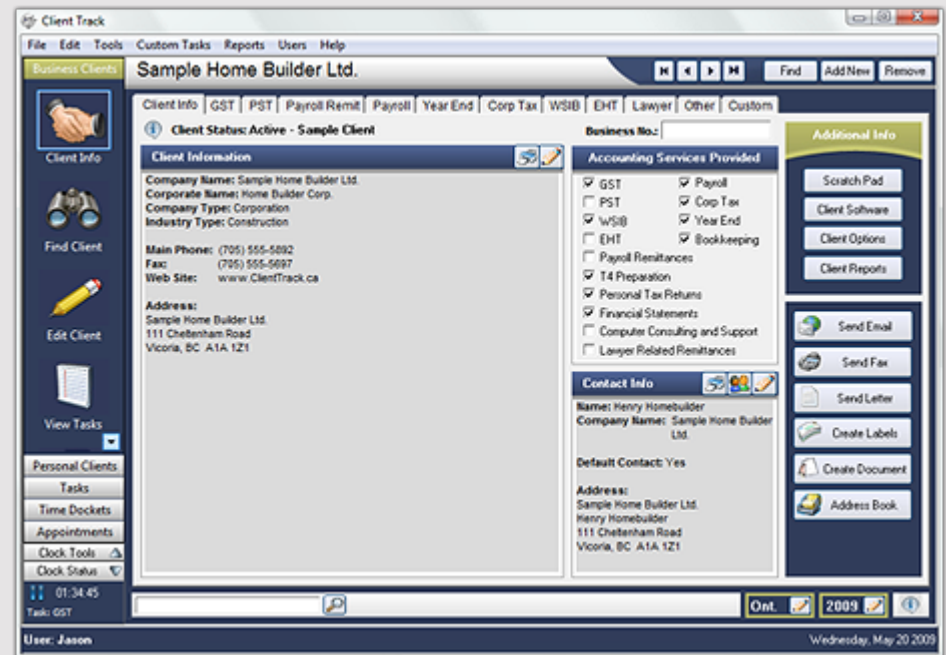


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Time & Billing

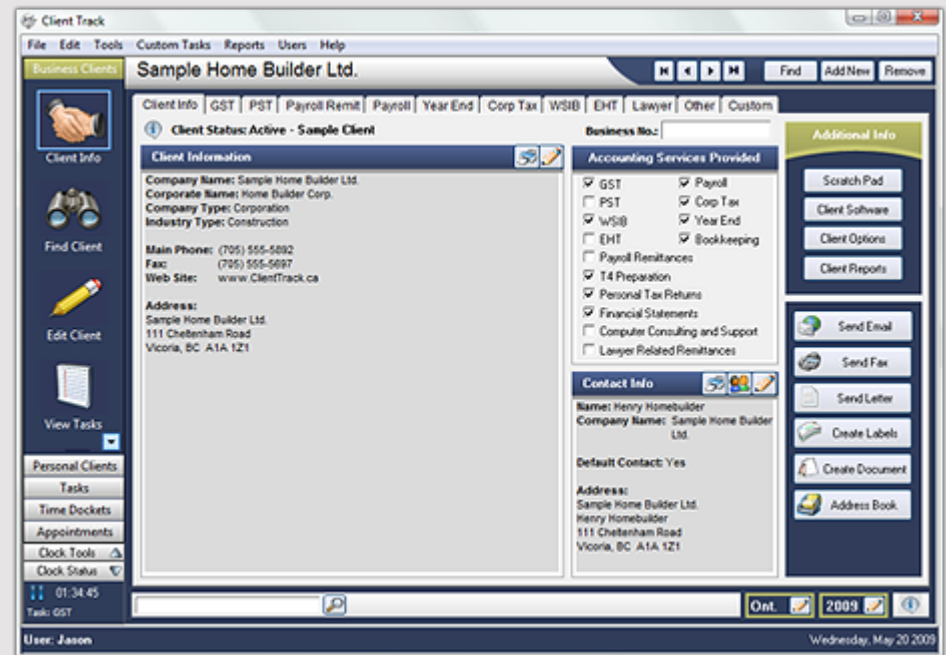


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Appointment Scheduler

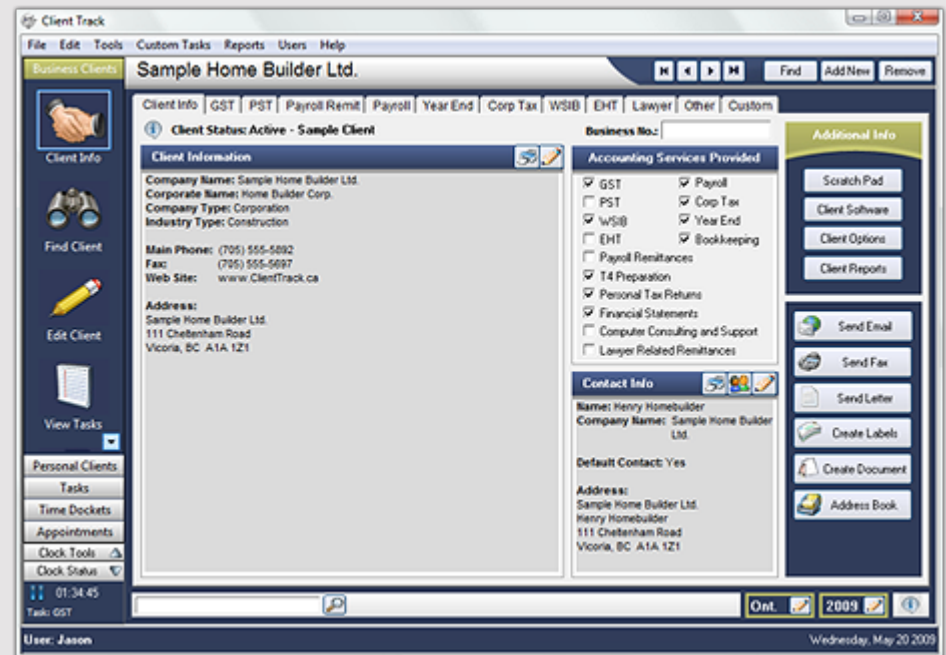


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Document Vault

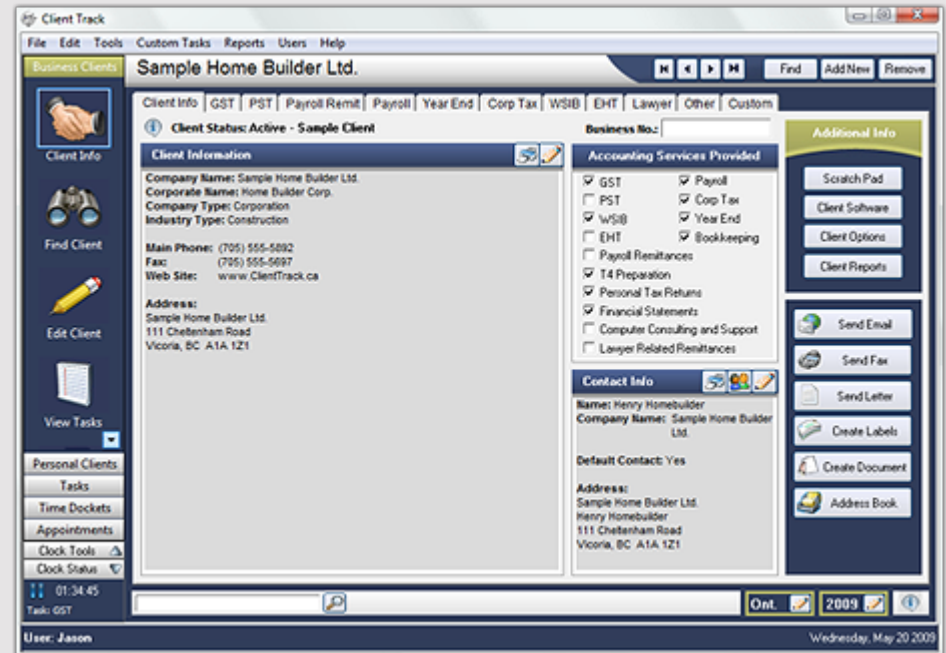


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Document Merge

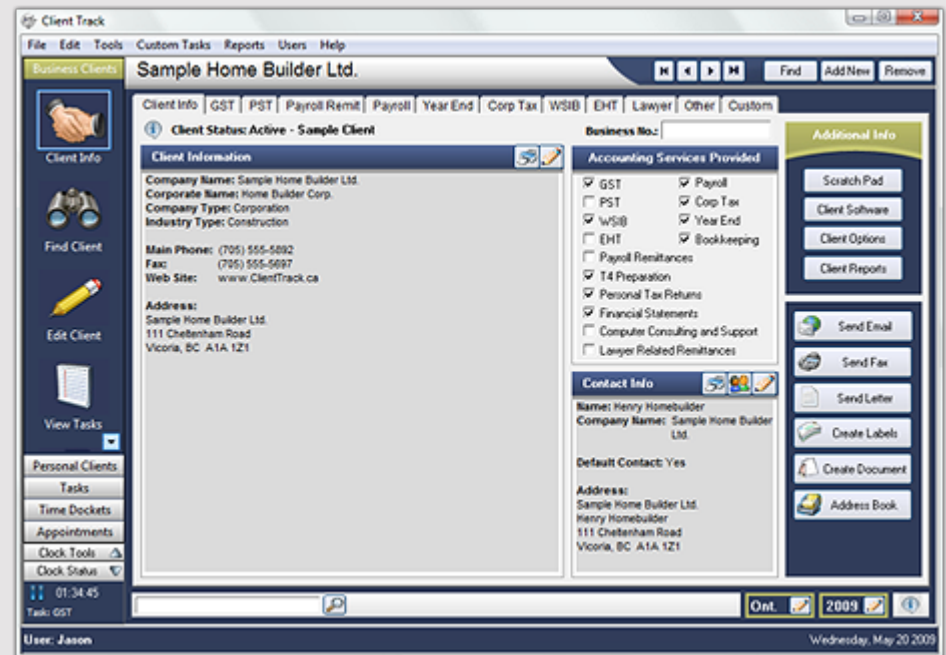


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Label Merge

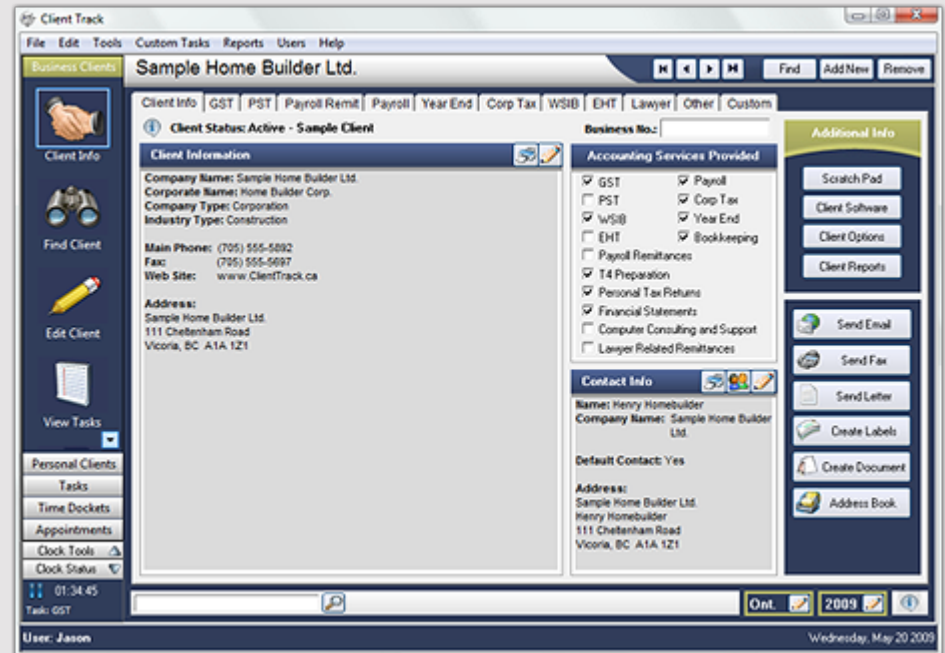


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

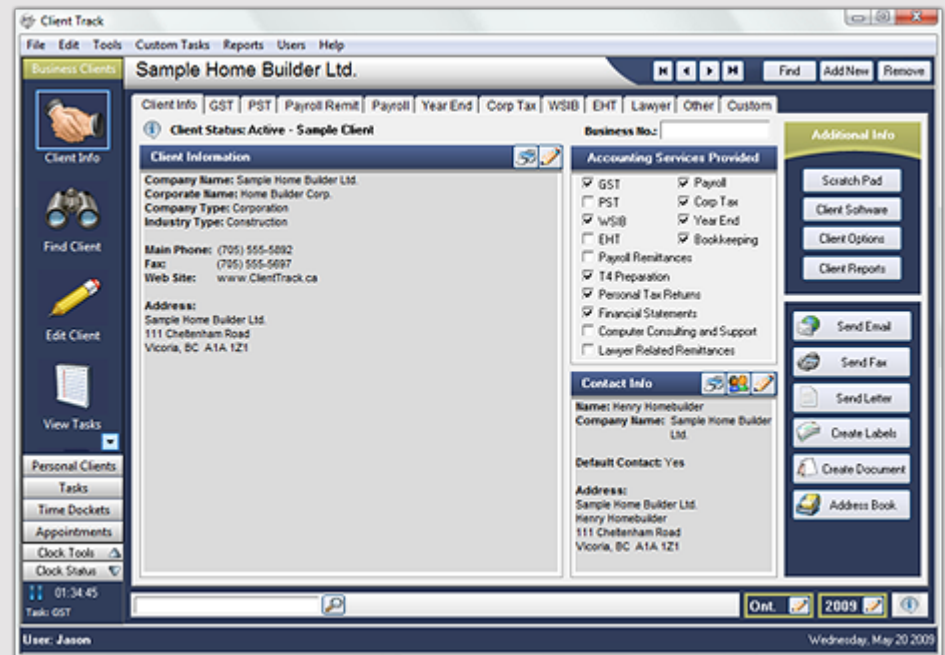
Reports **and much more!**



CLIENT INFORMATION

CLIENT TRACK 5.0

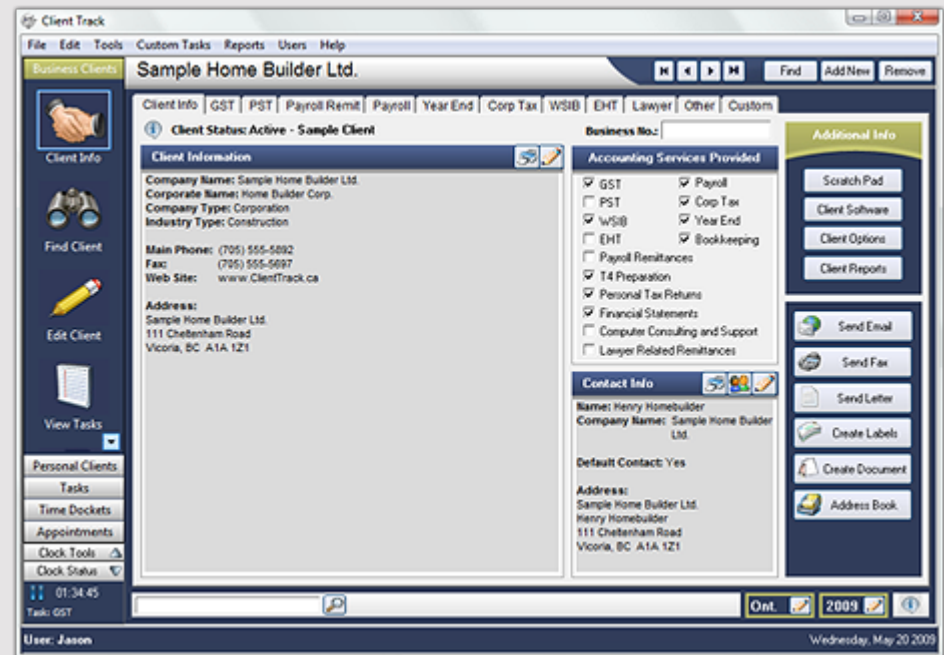
- Control your client's information with over 200 different information fields in Client Track.
- Record all of your client's business, accounting and personal information in one place.
- Add any additional information about your clients in the custom fields and in notes section.



CLIENT INFORMATION

CLIENT TRACK 5.0

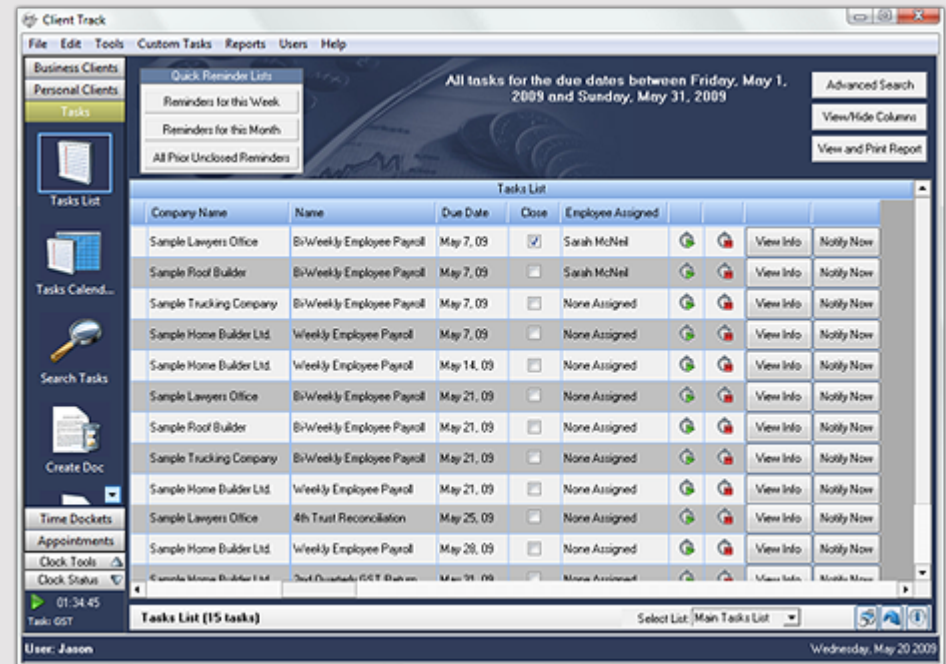
- Client Track is designed to be used on a network.
- Any changes made to your client's information is reflected across the network instantly.
- All information is searchable.



CLIENT TASKS *

CLIENT TRACK 5.0

- Assure your clients that they will never miss another deadline again.
- Can view and organize all of your clients' tasks.
- Can quickly set up and schedule one-time or recurring task deadlines.

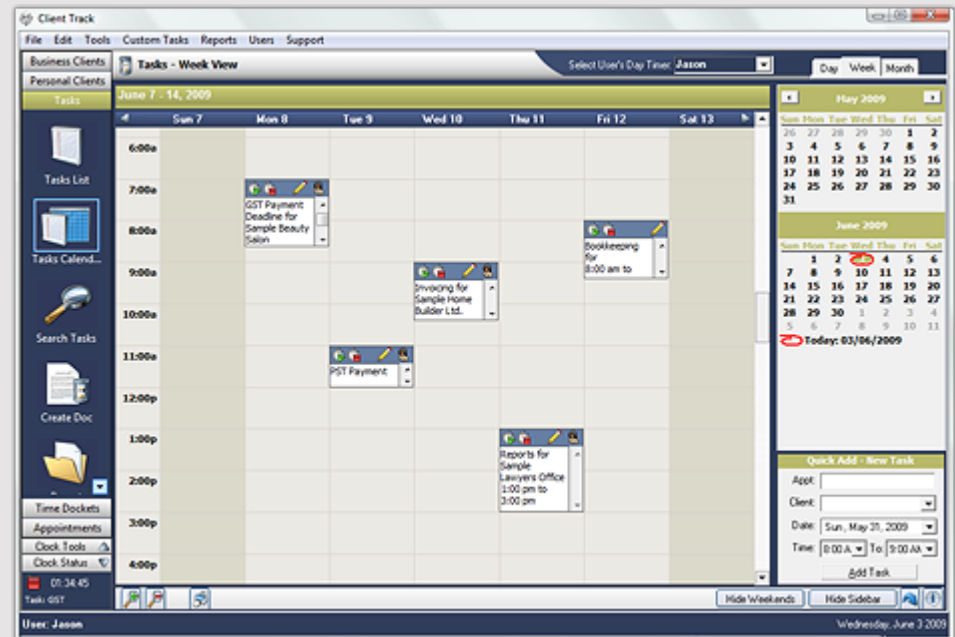


*AVAILABLE IN SMALL BUSINESS AND TIME & BILLING EDITIONS.

CLIENT TASKS *

CLIENT TRACK 5.0

- Our new calendar view allows you to view and organize your staff's workload at a glance.
- Easily allocate tasks to your staff members and have them view it instantly.
- Flag priority items and problems for everyone to see.



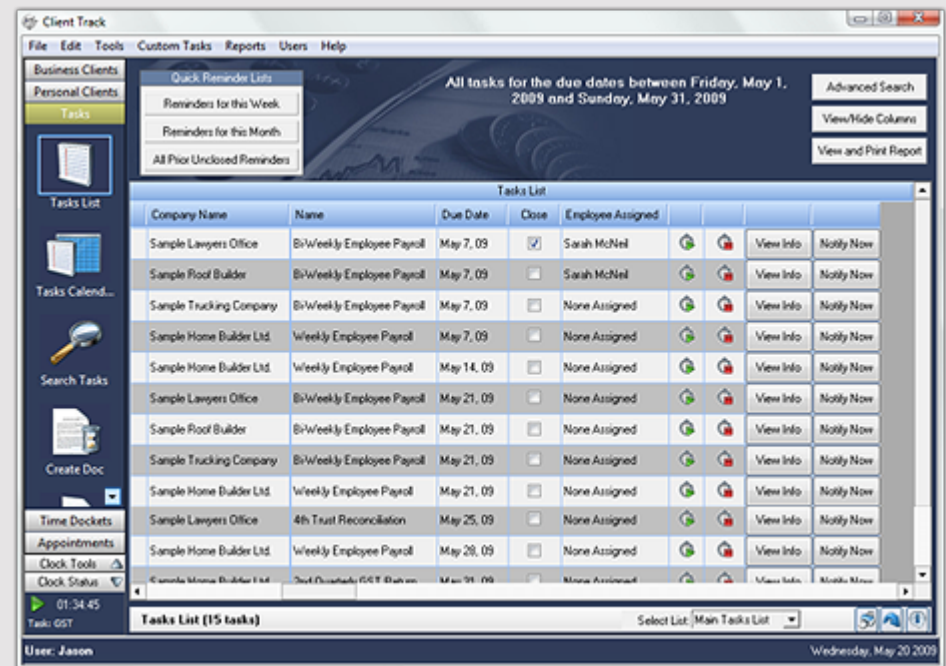
*AVAILABLE IN SMALL BUSINESS AND
TIME & BILLING EDITIONS.

CLIENT TASKS *

CLIENT TRACK 5.0

- Schedule your clients' remittances and returns by choosing the remittance type and clicking on the type of payment plan for that client.
- Client Track knows all the remittance dates so you don't have to.
- Automatically reschedules all of your remittances year after year.

*AVAILABLE IN SMALL BUSINESS AND TIME & BILLING EDITIONS.



CLIENT NOTIFICATION

CLIENT TRACK 5.0

- Send automatic notifications to your clients notifying them of upcoming deadlines by email, fax, letter or remind them by phone.
- Can edit template comments, add or change anything you want before sending final notification to clients.
- Uses your default email program.

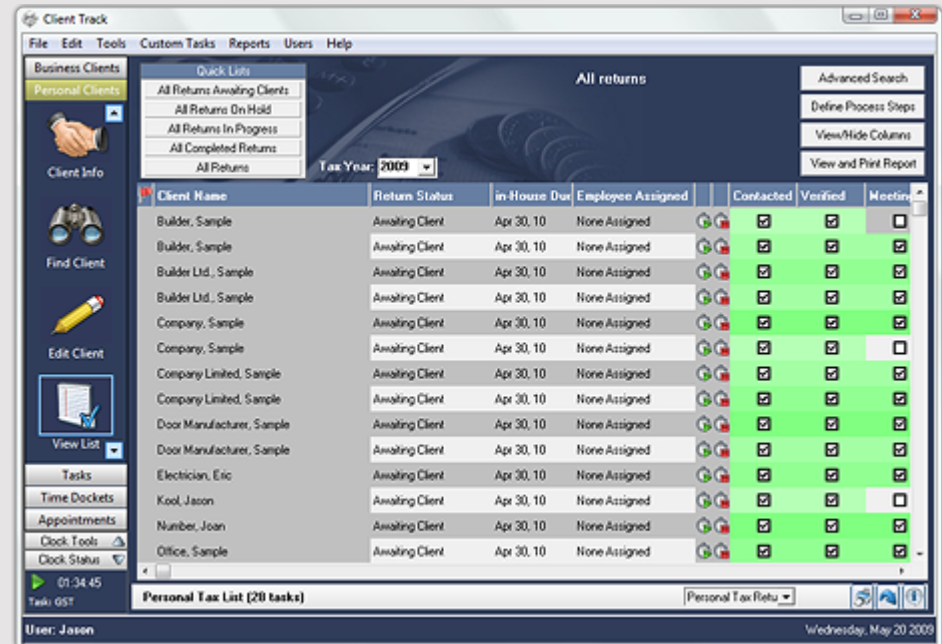
The image displays two overlapping screenshots of the 'Send Notification Wizard' dialog box. The left window shows the 'Notification Date' set to 'Wednesday, May 20, 2009' and the 'Notification Method' set to 'Email'. The right window shows the 'To' field set to 'Jake Lawyer', the 'Cc' field empty, and the 'Bcc' field empty. The 'Subject' field is set to 'Your employee payroll is due on Thursday, May 7 2009.' The 'Finish' button is visible at the bottom right of the right window.

PERSONAL TAX

CLIENT TRACK 5.0

- Very easy to lose track of returns or to determine who have brought in all their information during busy income tax period.
- Easily import your client's information from other tax packages such as :

Profile T1



The screenshot shows the 'Client Track' software interface. The main window displays a list of clients under the 'Personal Clients' tab. The table has columns for Client Name, Return Status, in-House Due, Employee Assigned, Contacted, Verified, and Meeting. The 'Return Status' for all clients is 'Awaiting Client'. The 'in-House Due' date for all is 'Apr 30, 10'. The 'Employee Assigned' is 'None Assigned'. The 'Contacted' and 'Verified' columns have green checkmarks, and the 'Meeting' column has checkboxes. The 'Tax Year' is set to 2009. The interface includes a menu bar (File, Edit, Tools, Custom Tasks, Reports, Users, Help), a sidebar with navigation options (Client Info, Find Client, Edit Client, View List, Tasks, Time Dockets, Appointments, Clock Tools, Clock Status), and a status bar at the bottom showing 'User: Jason' and 'Wednesday, May 20 2009'.

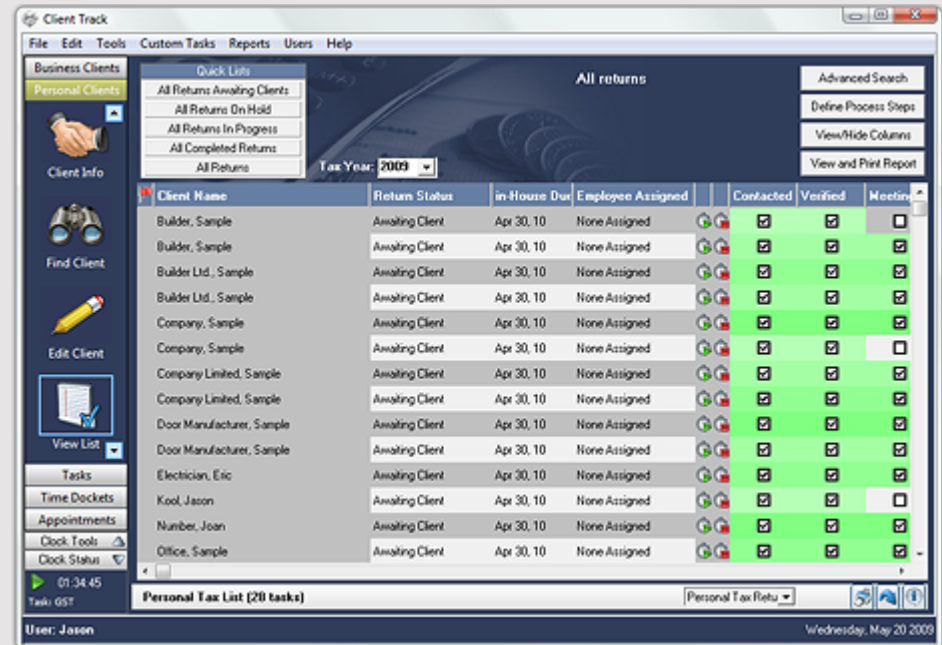
Client Name	Return Status	in-House Due	Employee Assigned	Contacted	Verified	Meeting
Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Electrician, Eric	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Kool, Jason	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Number, Joan	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Office, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

PERSONAL TAX

CLIENT TRACK 5.0

- Very easy to lose track of returns or to determine who have brought in all their information during busy income tax period.
- Easily import your client's information from other tax packages such as :

CANTAX

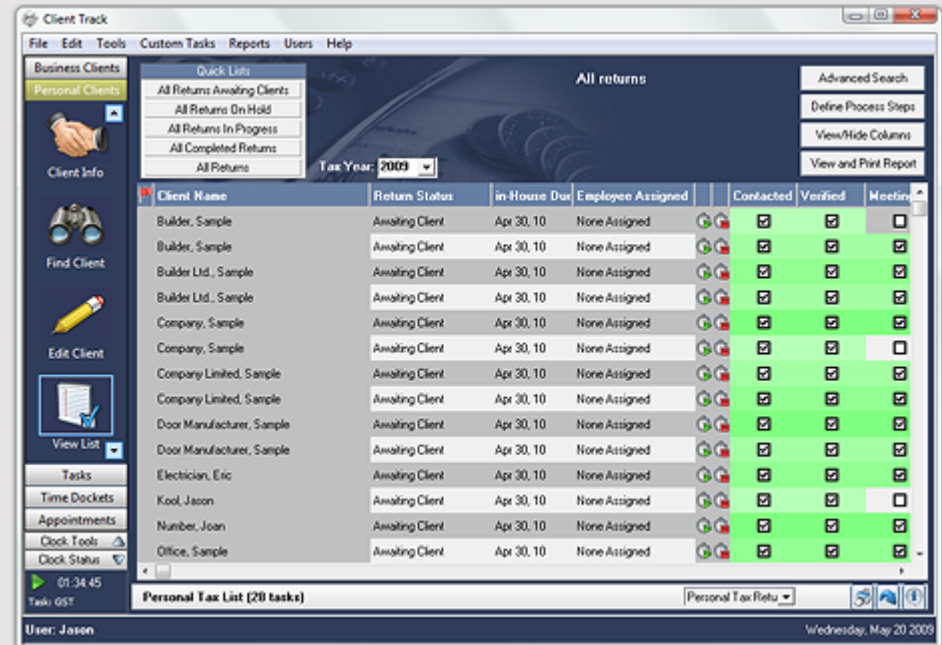


PERSONAL TAX

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Dr.Tax

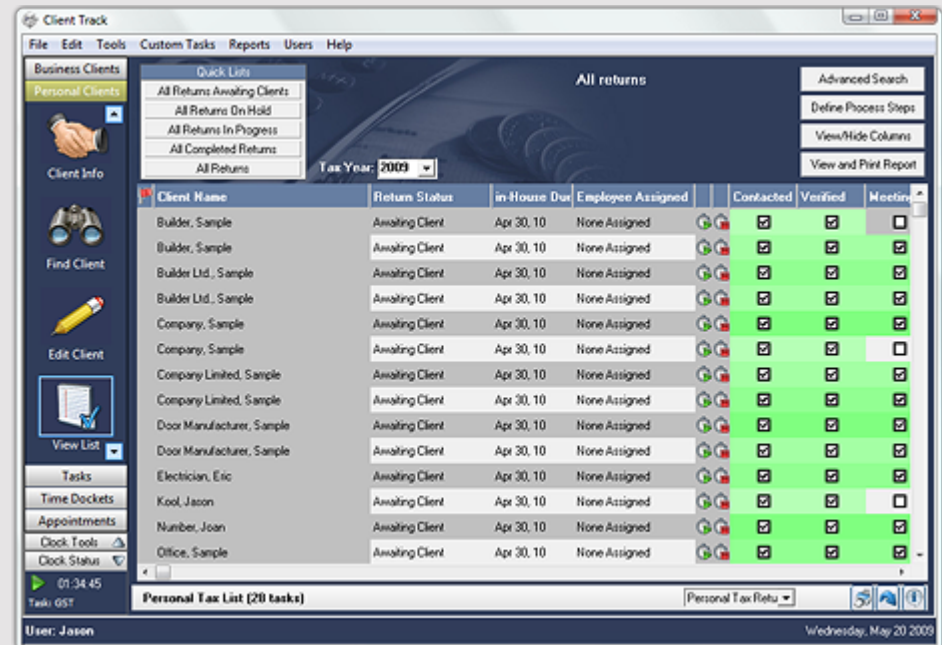


PERSONAL TAX

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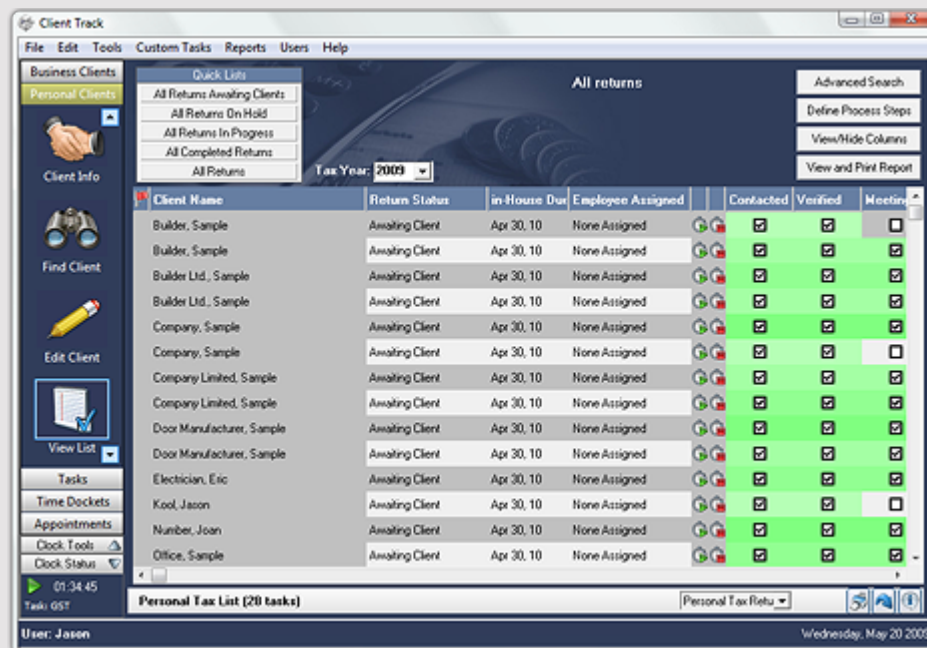
Text/CSV file



PERSONAL TAX

CLIENT TRACK 5.0

- Client Track allows you to set up a series of steps to indicate the process of completing a return.
- You can check off which steps have been completed for each client so you know exactly where everyone is.



PERSONAL TAX

CLIENT TRACK 5.0

- With a complete list of personal tax clients, you can quickly view :

Who has brought in their information

The screenshot displays the 'Client Track' software interface. The main window shows a list of clients under the 'Personal Clients' tab. The list includes columns for Client Name, Return Status, in-House Due, Employee Assigned, Contacted, Verified, and Meeting. The 'Tax Year' is set to 2009. The interface also features a sidebar with navigation options like 'Client Info', 'Find Client', and 'Edit Client', and a top menu with 'File', 'Edit', 'Tools', 'Custom Tasks', 'Reports', 'Users', and 'Help'.

Client Name	Return Status	in-House Due	Employee Assigned	Contacted	Verified	Meeting
Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Electrician, Eric	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Kool, Jason	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Number, Joan	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Office, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

PERSONAL TAX

CLIENT TRACK 5.0

- With a complete list of personal tax clients, you can quickly view :

Which returns are **‘on hold’** due to missing documents/questions.

The screenshot displays the 'Client Track' software interface. The main window shows a list of clients under the 'Personal Clients' tab. The 'Return Status' column indicates that all listed clients are 'Awaiting Client'. The 'in-House Due' column shows dates for April 30, 2010. The 'Employee Assigned' column shows 'None Assigned' for all clients. The 'Contacted', 'Verified', and 'Meeting' columns contain icons representing the status of these actions. A 'Quick Lists' menu is open, showing options like 'All Returns Awaiting Clients', 'All Returns On Hold', 'All Returns In Progress', 'All Completed Returns', and 'All Returns'. The 'Tax Year' is set to 2009. The interface also includes a sidebar with navigation options like 'Client Info', 'Find Client', 'Edit Client', and 'View List'. The bottom status bar shows 'User: Jason' and the date 'Wednesday, May 20 2009'.

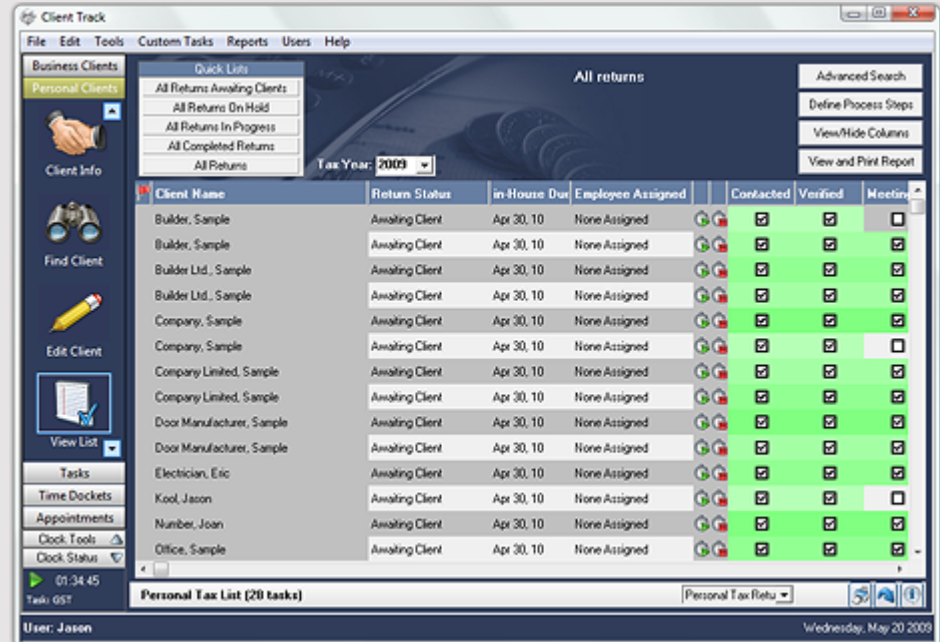
Client Name	Return Status	in-House Due	Employee Assigned	Contacted	Verified	Meeting
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Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned			
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned			
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned			
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned			
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned			
Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned			
Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned			
Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned			
Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned			
Electrician, Eric	Awaiting Client	Apr 30, 10	None Assigned			
Kool, Jason	Awaiting Client	Apr 30, 10	None Assigned			
Number, Joan	Awaiting Client	Apr 30, 10	None Assigned			
Office, Sample	Awaiting Client	Apr 30, 10	None Assigned			

PERSONAL TAX

CLIENT TRACK 5.0

- With a complete list of personal tax clients, you can quickly view :

What the status of each return is



The screenshot displays the 'Client Track' software interface. The main window shows a list of personal tax clients with columns for Client Name, Return Status, in-House Due, Employee Assigned, Contacted, Verified, and Meeting. The 'Return Status' column is highlighted in blue, and the 'Contacted' and 'Verified' columns are highlighted in green. The 'Meeting' column has checkboxes. The interface includes a menu bar (File, Edit, Tools, Custom Tasks, Reports, Users, Help), a sidebar with navigation options (Business Clients, Personal Clients, Client Info, Find Client, Edit Client, View List, Tasks, Time Dockets, Appointments, Clock Tools, Clock Status), and a 'Quick Lists' dropdown menu. The 'Tax Year' is set to 2009. The status bar at the bottom shows 'User: Jason' and 'Wednesday, May 20 2009'.

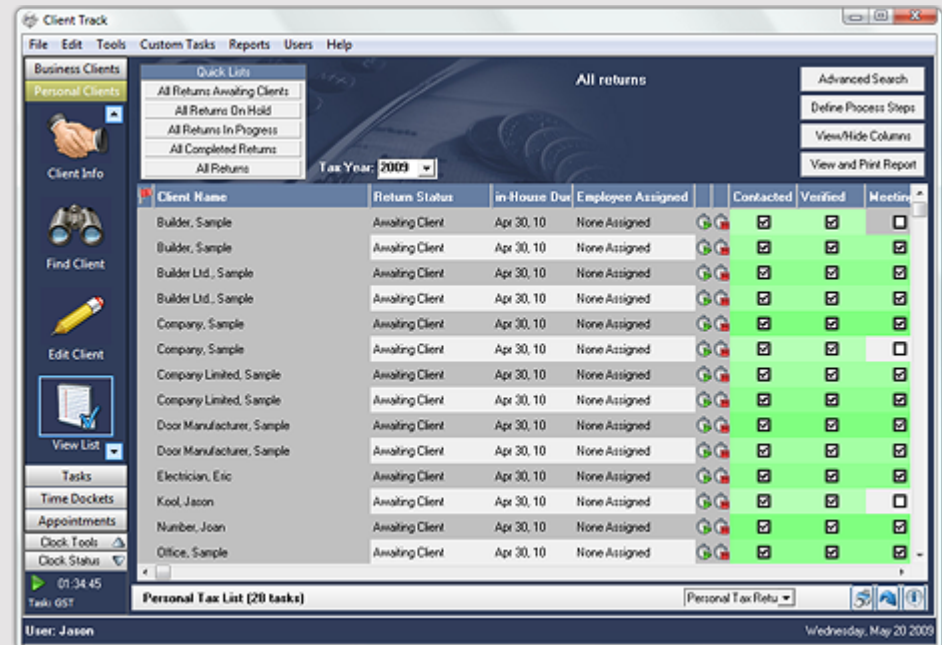
Client Name	Return Status	in-House Due	Employee Assigned	Contacted	Verified	Meeting
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Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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Number, Joan	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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PERSONAL TAX

CLIENT TRACK 5.0

- With a complete list of personal tax clients, you can quickly view :

Where your problems are



The screenshot displays the 'Client Track' software interface. The main window shows a list of clients under the 'Personal Clients' tab. The table below represents the data shown in the interface.

Client Name	Return Status	In-House Due	Employee Assigned	Contacted	Verified	Meeting
Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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Number, Joan	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Office, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The interface also includes a 'Quick Lists' menu with options like 'All Returns Awaiting Clients', 'All Returns On Hold', 'All Returns In Progress', 'All Completed Returns', and 'All Returns'. The 'Tax Year' is set to 2009. The status bar at the bottom indicates 'Personal Tax List (20 tasks)' and 'User: Jason'.

PERSONAL TAX

CLIENT TRACK 5.0

- With a complete list of personal tax clients, you can quickly view :

Who is working on it

The screenshot displays the 'Client Track' software interface. The main window shows a list of clients under the 'Personal Clients' tab. The 'Quick Lists' menu is open, showing options like 'All Returns Awaiting Clients', 'All Returns On Hold', 'All Returns In Progress', 'All Completed Returns', and 'All Returns'. The 'Tax Year' is set to 2009. The main table lists clients with columns for Client Name, Return Status, in-House Due, Employee Assigned, Contacted, Verified, and Meeting. The status for all clients is 'Awaiting Client'. The interface also includes a sidebar with navigation options like 'Client Info', 'Find Client', 'Edit Client', and 'View List'. The bottom status bar shows 'User: Jason' and the date 'Wednesday, May 20 2009'.

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Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Electrician, Eric	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Kool, Jason	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Number, Joan	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Office, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

PERSONAL TAX

CLIENT TRACK 5.0

- Preparer can list any questions or record missing documentation required in Client Track for each personal tax client.

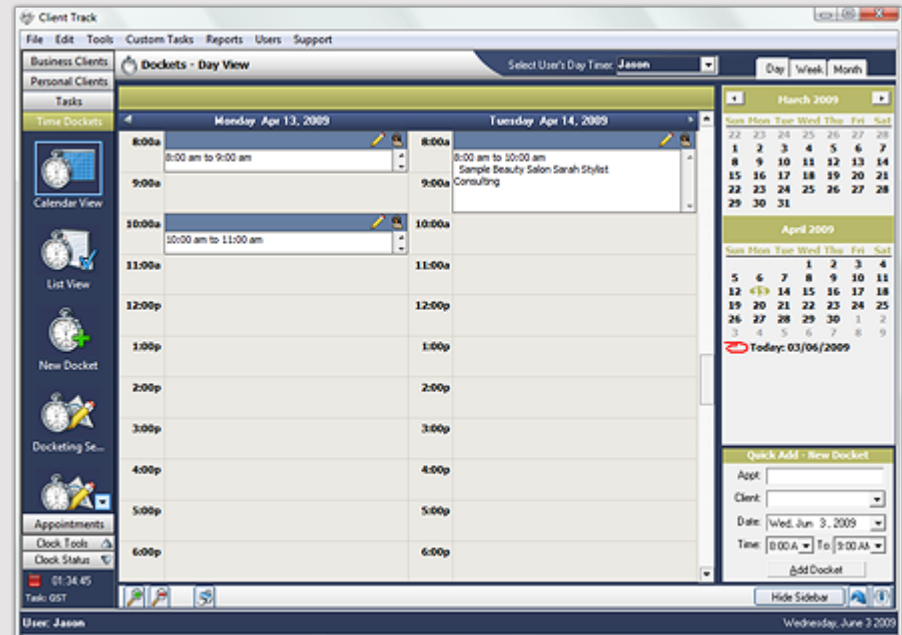
The screenshot displays the Client Track software interface. The main window is titled "Client Track" and features a menu bar with "File", "Edit", "Tools", "Custom Tasks", "Reports", "Users", and "Help". On the left side, there is a navigation pane with "Business Clients" and "Personal Clients" sections. The "Personal Clients" section is active, showing a list of clients with icons for "Client Info", "Find Client", and "Edit Client". A "View List" button is also visible. The main area displays a table of clients with columns for "Client Name", "Return Status", "In-House Due", "Employee Assigned", "Contacted", "Verified", and "Meeting". The table is filtered to show "All Returns Awaiting Clients" for the tax year 2009. The status of each client is "Awaiting Client", and the due date is "Apr 30, 10". The "Employee Assigned" column shows "None Assigned". The "Contacted" and "Verified" columns have checkboxes, and the "Meeting" column has a checkbox. The bottom status bar shows "User: Jason" and "Wednesday, May 20 2009".

Client Name	Return Status	In-House Due	Employee Assigned	Contacted	Verified	Meeting
Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bulder, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bulder Ltd., Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Limited, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Door Manufacturer, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Electrician, Eric	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Kool, Jason	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Number, Joan	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Office, Sample	Awaiting Client	Apr 30, 10	None Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

TIME & BILLING*

CLIENT TRACK 5.0

- Client Track includes a new **Time & Billing Module**.
- We've built this module from the ground up based on feedback from our Client Track customers.

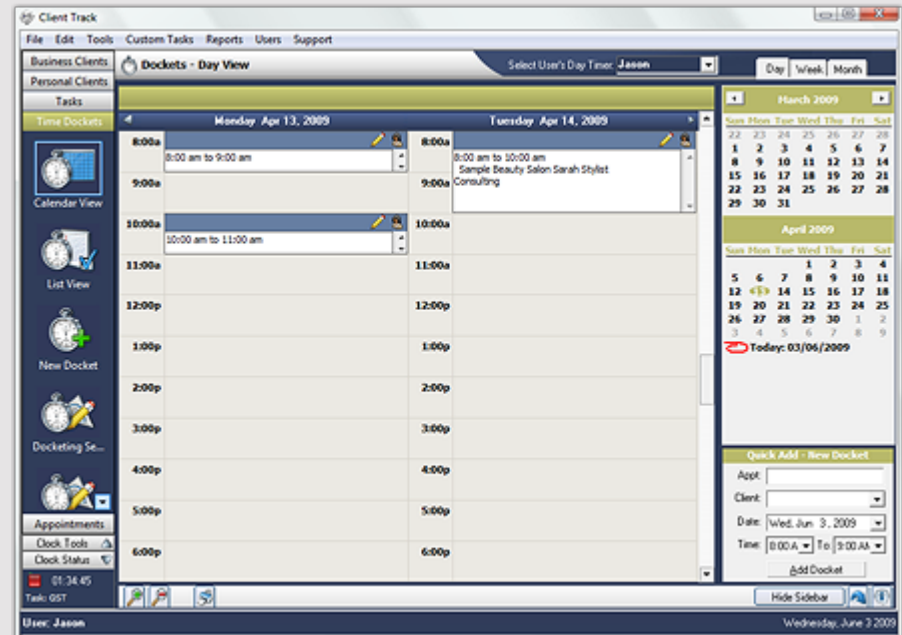


*AVAILABLE IN TIME & BILLING EDITION

TIME & BILLING*

CLIENT TRACK 5.0

- Our comprehensive Time & Billing Module allows you to quickly and easily create time docketets based on the tasks and appointments already set up in Client Track.

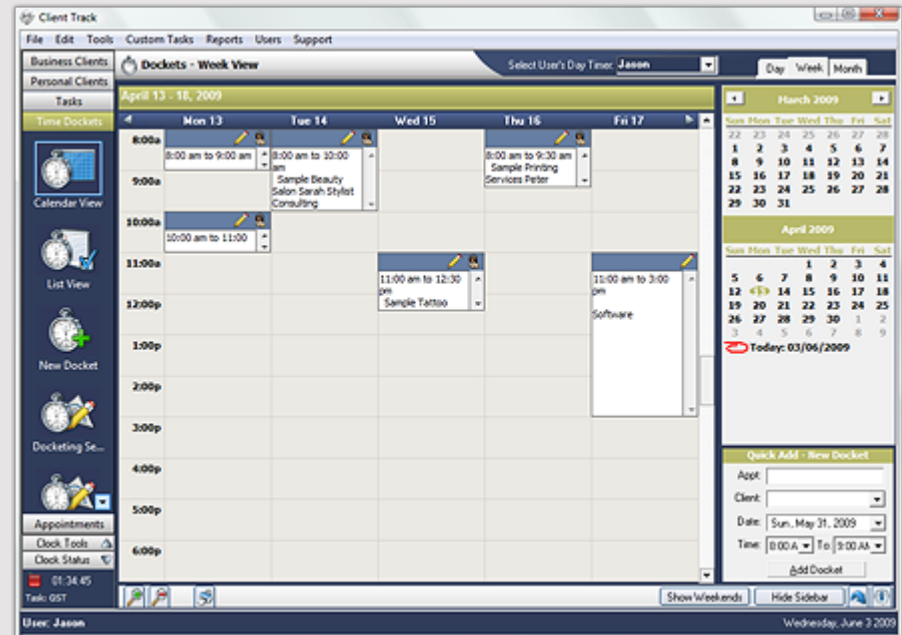


*AVAILABLE IN TIME & BILLING EDITION

TIME & BILLING*

CLIENT TRACK 5.0

- Our handy interrupt timer gives you the flexibility to handle interruptions and quickly switch between tasks as you manage your busy schedule.

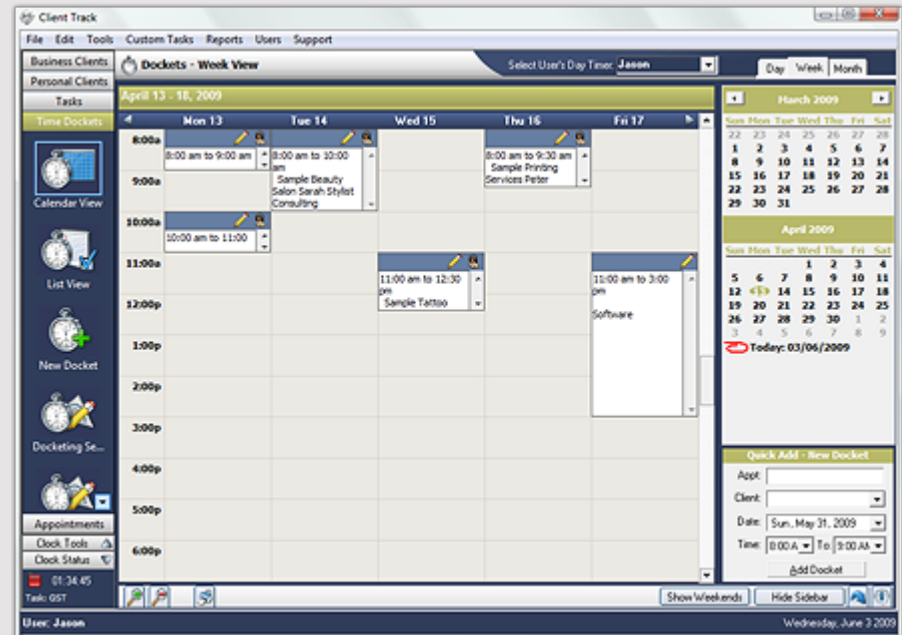


*AVAILABLE IN TIME & BILLING EDITION

TIME & BILLING*

CLIENT TRACK 5.0

- Set up your billing by the hour, job or using flat rate.
- Specify the billing type and rate for each employee's task type.



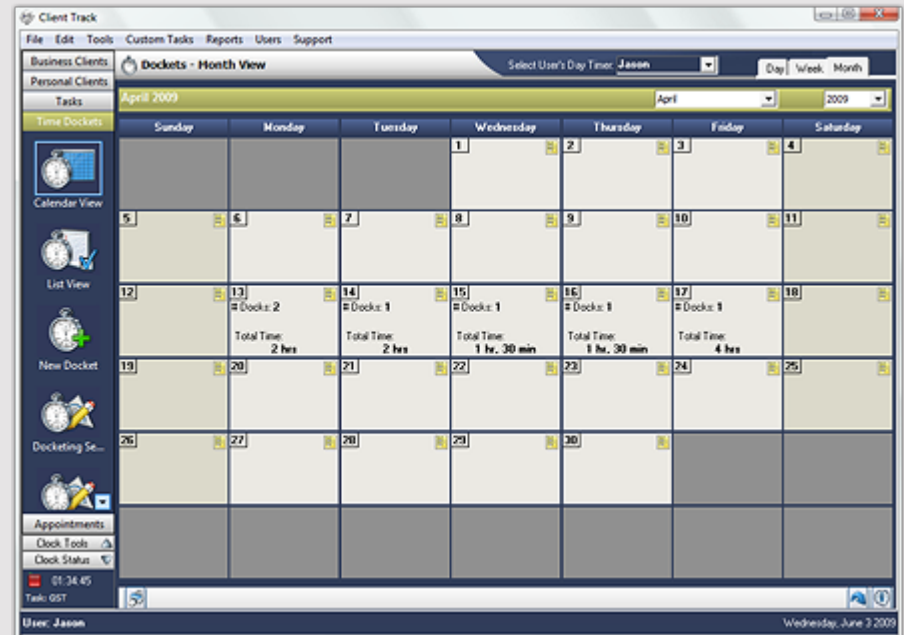
*AVAILABLE IN TIME & BILLING EDITION

TIME & BILLING*

CLIENT TRACK 5.0

- Timers to record how long staff member is working on a task. When you click the start/stop timers on a task, Client Track knows :

Which staff member is logged in



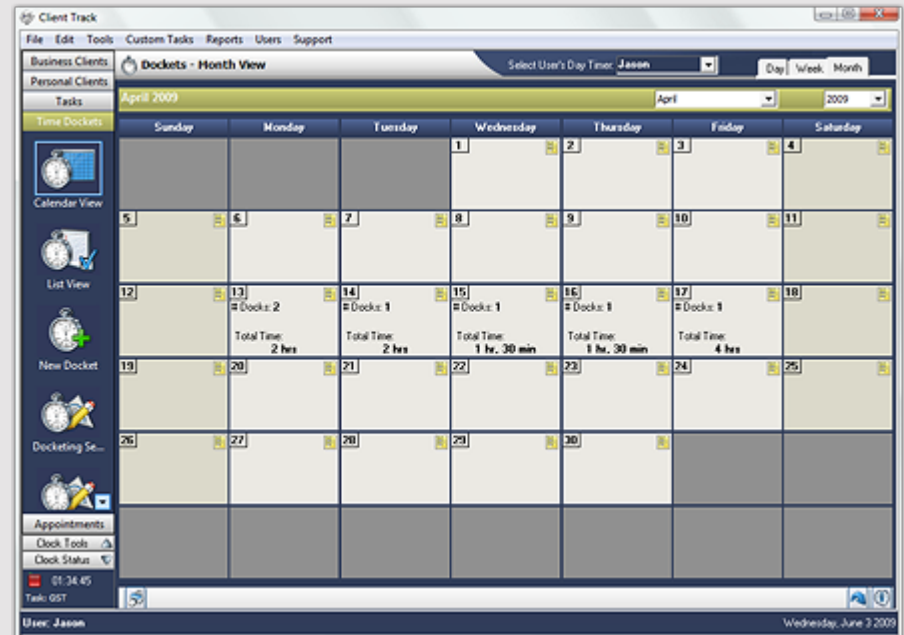
*AVAILABLE IN TIME & BILLING EDITION

TIME & BILLING*

CLIENT TRACK 5.0

- Timers to record how long staff member is working on a task. When you click the start/stop timers on a task, Client Track knows :

Who the client is



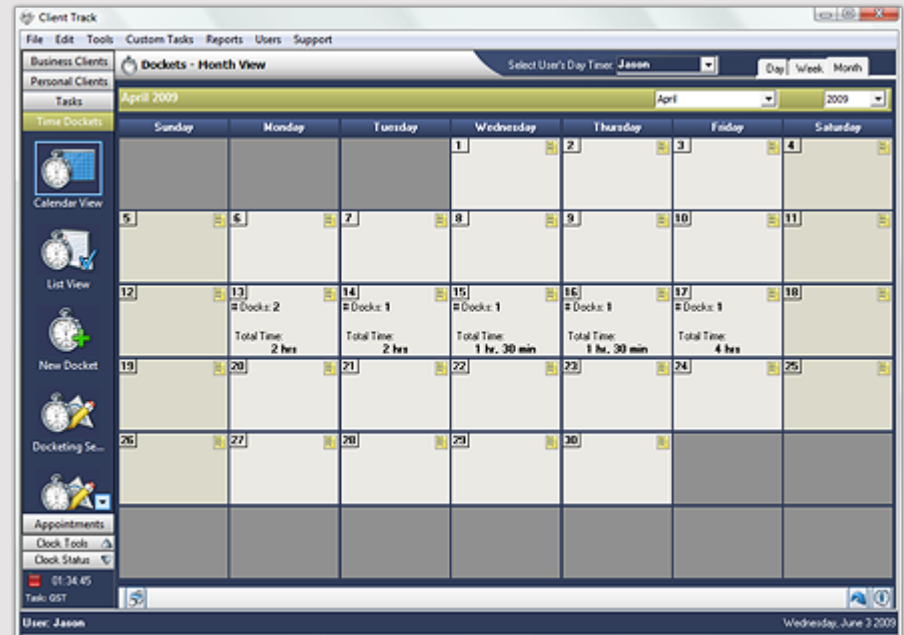
*AVAILABLE IN TIME & BILLING EDITION

TIME & BILLING*

CLIENT TRACK 5.0

- Timers to record how long staff member is working on a task. When you click the start/stop timers on a task, Client Track knows :

What the billing type/rate for staff is



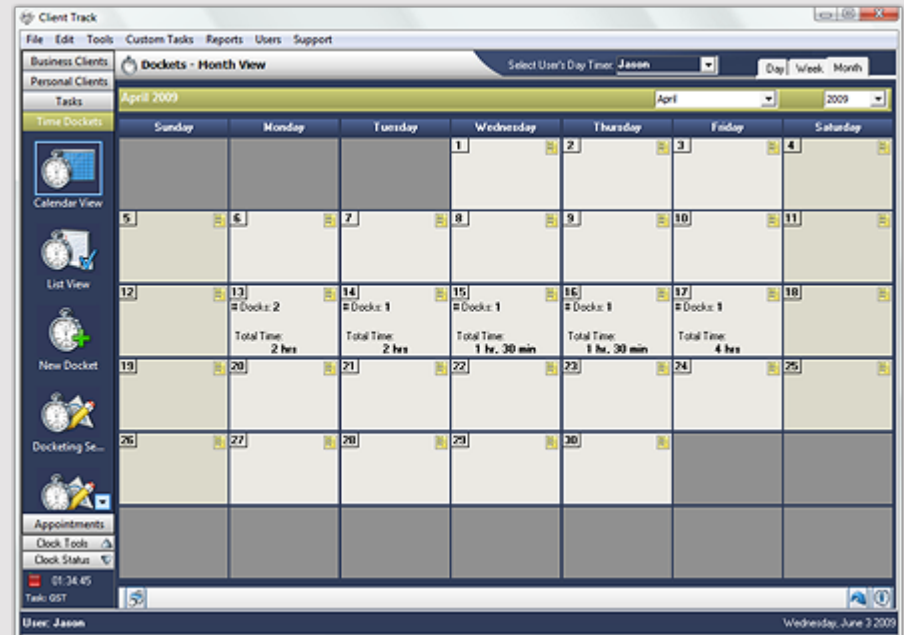
*AVAILABLE IN TIME & BILLING EDITION

TIME & BILLING*

CLIENT TRACK 5.0

- Timers to record how long staff member is working on a task. When you click the start/stop timers on a task, Client Track knows :

How long staff member(s) spent on task



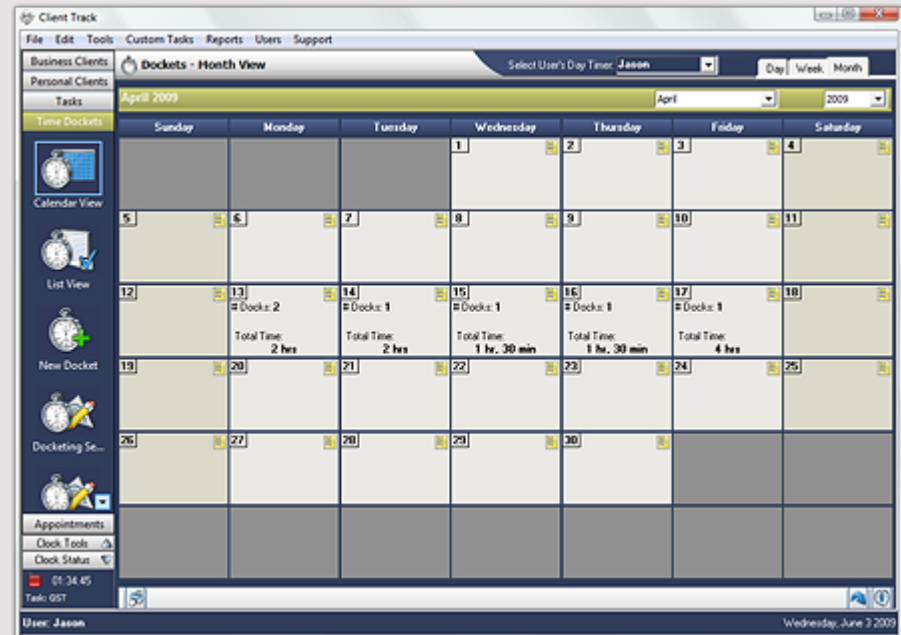
*AVAILABLE IN TIME & BILLING EDITION

TIME & BILLING*

CLIENT TRACK 5.0

- Timers to record how long staff member is working on a task. When you click the start/stop timers on a task, Client Track knows :

Description of work performed

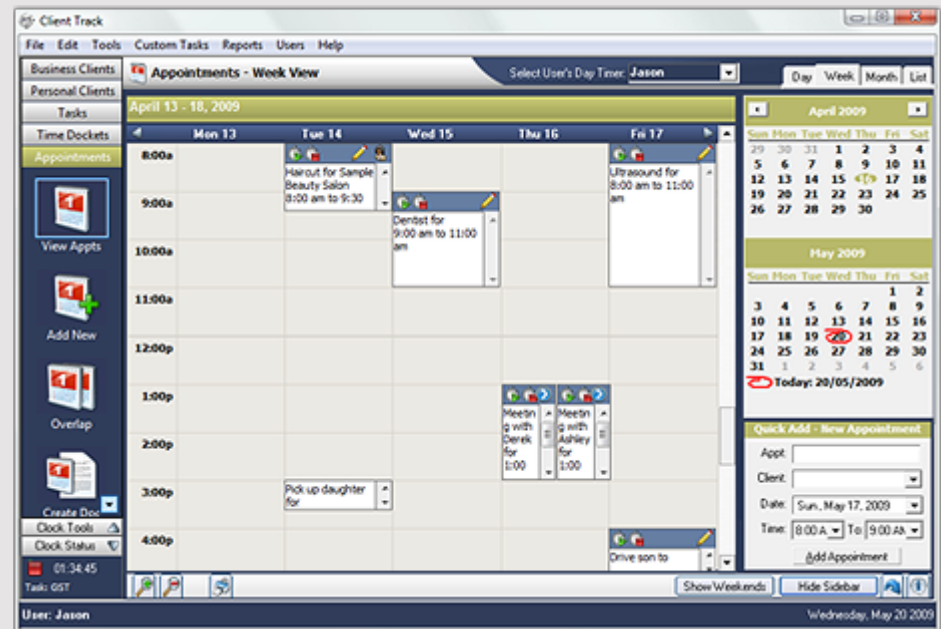


*AVAILABLE IN TIME & BILLING EDITION

APPOINTMENT SCHEDULER

CLIENT TRACK 5.0

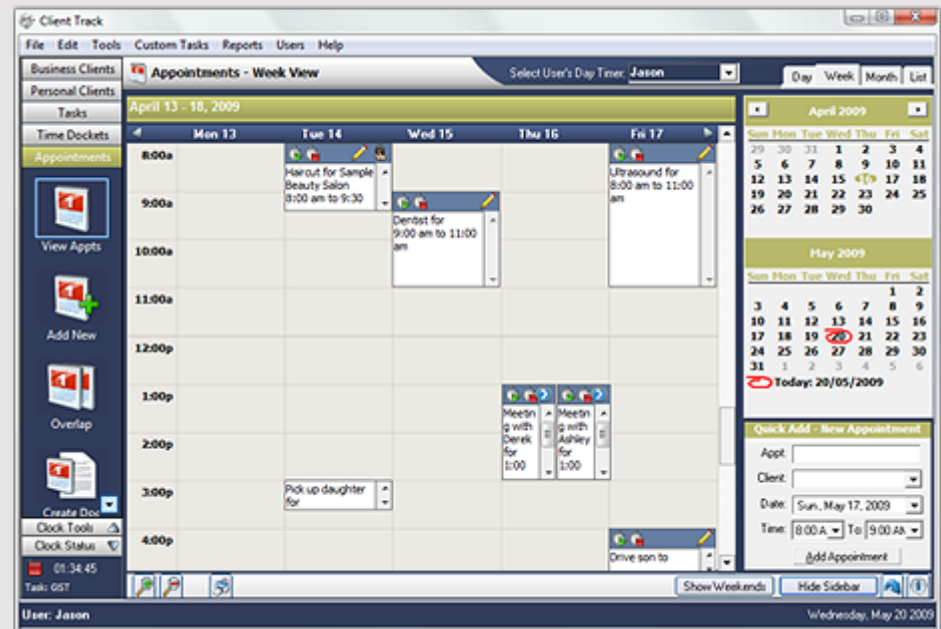
- Includes an easy-to-use appointment scheduler complete with multiple views.
- Client Track runs off a central database on your network allowing everyone to view and access each other's schedules.



APPOINTMENT SCHEDULER

CLIENT TRACK 5.0

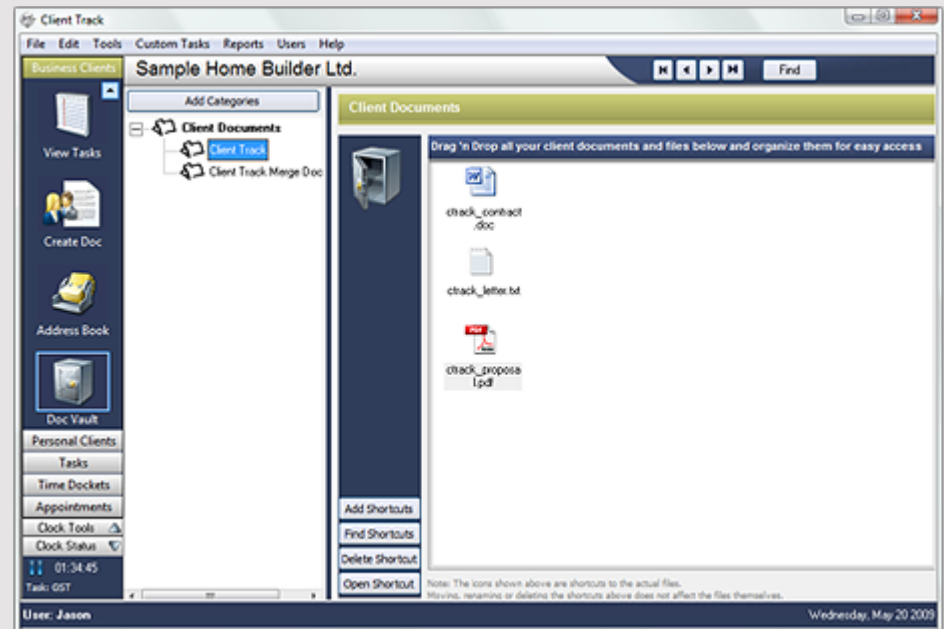
- Create repeating appointments and assign them to multiple staff members at once.
- **Overlap Wizard** allows you to overlap two or more staff's appointment schedules, allowing you to quickly see common available times.



DOCUMENT VAULT

CLIENT TRACK 5.0

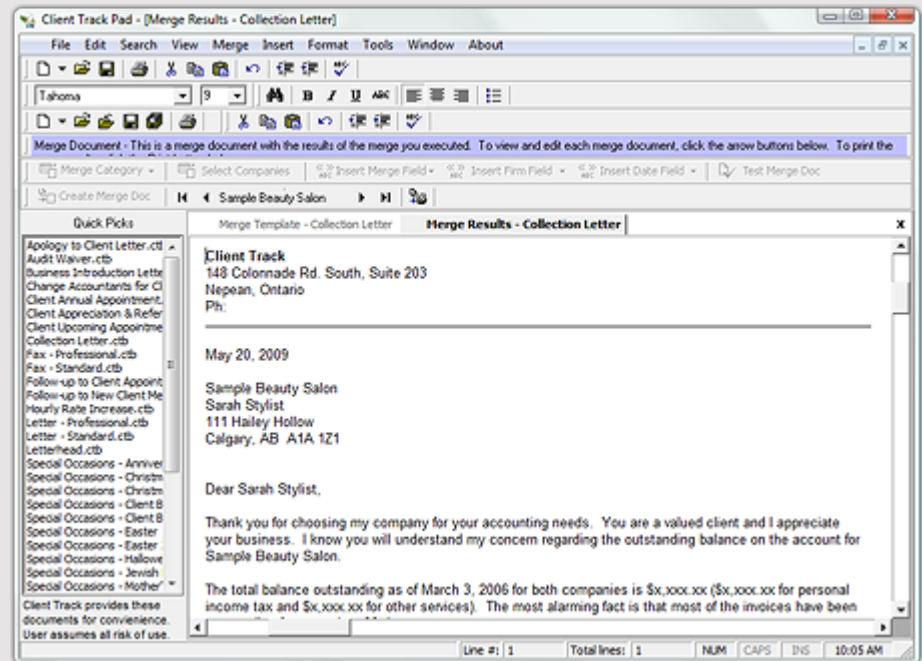
- Manage and organize your client's information.
- Records shortcut of original files
- Organize your clients' files into categories so all of your client's information is at your fingertips regardless of where your files are saved on your computer.



DOCUMENT MERGE

CLIENT TRACK 5.0

- Easily create template documents, letters and merge any of your client's information directly into the documents.
- Client Track will automatically save a copy of the merge documents to each client's **Doc Vault**.

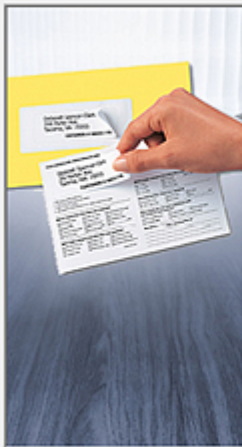


LABEL MERGE

CLIENT TRACK 5.0

- Quickly create client and return labels based on any information fields you have in Client Track.
- **Label Wizard** allows you to save your label templates so you can print them in seconds for any of your clients.

Label Wizard - Choose your label options



Enter the number of labels you want to print for each company

Company Name	No. of Labels
Sample Beauty Salon	20

Fill Label Sheet Change all quantities above to:

Open a saved label scheme

Click here to open a saved scheme

Select your label type

Avery 5161 - Address Labels (1" x 4")

REPORTS

CLIENT TRACK 5.0

- Offers dozens of professional reports to streamline your office documentation.
- Easily print address lists, detailed forms and summary reports.
- Tasks lists can be created to show all of the tasks that you need to perform in any specified period.

The screenshot displays two reports from the Client Track software. The first report, titled 'Client Track Report' and 'All GST Reminders for 2008', is a table with columns for Company Name, Task Name, Due Date, and checkboxes for 'PRINT' and 'REMOVE'. The second report, also titled 'Client Track Report' and 'Task List', shows tasks for the period between Monday, September 1, 2008, and Tuesday, September 30, 2008. It includes columns for Company Name, Name, Due Date, a 'Close' checkbox, and 'Employee Assigned'.

Company Name	Task Name	Due Date	PRINT	REMOVE
Client Track	12m Monthly GST	31 Jan 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Electric Company	1st Quarterly GST	31 Jan 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Lawyers Office	1st Quarterly GST	31 Jan 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Overhead Door	1st Quarterly GST	31 Jan 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Printing Services	1st Quarterly GST	31 Jan 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Trucking	1st Quarterly GST	31 Jan 08	<input type="checkbox"/>	<input type="checkbox"/>
Client Track	1st Monthly GST Return	28 Feb 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Aesthetics Parlour	4th Quarterly GST	28 Feb 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Home Builder Ltd	1st Quarterly GST	28 Feb 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Roof Builder	1st Quarterly GST	28 Feb 08	<input type="checkbox"/>	<input type="checkbox"/>
Client Track	2nd Monthly GST Return	31 Mar 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Charitable	Annual GST Return	31 Mar 08	<input type="checkbox"/>	<input type="checkbox"/>
Client Track	3rd Monthly GST Return	30 Apr 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Electric Company	2nd Quarterly GST	30 Apr 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Lawyers Office	2nd Quarterly GST	30 Apr 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Overhead Door	2nd Quarterly GST	30 Apr 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Printing Services	2nd Quarterly GST	30 Apr 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Trucking	2nd Quarterly GST	30 Apr 08	<input type="checkbox"/>	<input type="checkbox"/>
Client Track	4th Monthly GST Return	31 May 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Aesthetics Parlour	1st Quarterly GST	31 May 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Home Builder Ltd	2nd Quarterly GST	31 May 08	<input type="checkbox"/>	<input type="checkbox"/>
Sample Roof Builder	2nd Quarterly GST	31 May 08	<input type="checkbox"/>	<input type="checkbox"/>
		30 Jun 08		

Company Name	Name	Due Date	Close	Employee Assigned
Sample Home Builder Ltd	Weekly Employee Payroll	2-Sep-08	<input type="checkbox"/>	None Assigned
Sample Trucking Company	Bi-Weekly Employee Payroll	9-Sep-08	<input type="checkbox"/>	None Assigned
Sample Roof Builder	Bi-Weekly Employee Payroll	9-Sep-08	<input type="checkbox"/>	None Assigned
Sample Lawyers Office	Bi-Weekly Employee Payroll	9-Sep-08	<input type="checkbox"/>	None Assigned
Sample Home Builder Ltd	Weekly Employee Payroll	9-Sep-08	<input type="checkbox"/>	None Assigned
Sample Home Builder Ltd	Weekly Employee Payroll	16-Sep-08	<input type="checkbox"/>	None Assigned
Sample Tabb Parlour	9th Oct. Monthly GST Return	23-Sep-08	<input type="checkbox"/>	None Assigned
Sample Lawyers Office	Bi-Weekly Employee Payroll	23-Sep-08	<input type="checkbox"/>	None Assigned
Sample Roof Builder	Bi-Weekly Employee Payroll	23-Sep-08	<input type="checkbox"/>	None Assigned
Sample Trucking Company	Bi-Weekly Employee Payroll	23-Sep-08	<input type="checkbox"/>	None Assigned
Sample Home Builder Ltd	Weekly Employee Payroll	23-Sep-08	<input type="checkbox"/>	None Assigned
Sample Lawyers Office	9th Trud Reconciliation	25-Sep-08	<input type="checkbox"/>	None Assigned
Client Track	9th Monthly GST Return	30-Sep-08	<input type="checkbox"/>	None Assigned
Sample Home Builder Ltd	Annual Contract Reporting	30-Sep-08	<input type="checkbox"/>	None Assigned
Sample Home Builder Ltd	Corporate Tax Return	30-Sep-08	<input type="checkbox"/>	None Assigned
Sample Home Builder Ltd	Weekly Employee Payroll	30-Sep-08	<input type="checkbox"/>	None Assigned

Page 1 of 1
Report Generated on: September 19, 08

CLIENT TRACK EDITIONS

CLIENT TRACK 5.0

INITIAL LICENSE

ADDITIONAL NETWORK LICENSE

PERSONAL TAX :

\$199.99

\$129.99

Personal Tax Edition is great for Accounting Professionals who do a lot of tax returns and need a great solution to keep control of all their client's T1s.

CLIENT TRACK EDITIONS

CLIENT TRACK 5.0

	INITIAL LICENSE	ADDITIONAL NETWORK LICENSE
PERSONAL TAX :	\$199.99	\$129.99

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	INITIAL LICENSE	ADDITIONAL NETWORK LICENSE
SMALL BUSINESS :	\$295.00	\$149.99

Small Business Edition is the perfect solution for Accounting Professionals to take control of their business and T1 clients in one comprehensive package.

CLIENT TRACK EDITIONS

CLIENT TRACK 5.0

	INITIAL LICENSE	ADDITIONAL NETWORK LICENSE
PERSONAL TAX :	\$199.99	\$129.99

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	INITIAL LICENSE	ADDITIONAL NETWORK LICENSE
SMALL BUSINESS :	\$295.00	\$149.99

Small Business Edition is the perfect solution for Accounting Professionals to take control of their business and T1 clients in one comprehensive package.

	INITIAL LICENSE	ADDITIONAL NETWORK LICENSE
TIME & BILLING :	\$349.00	\$179.99

Time & Billing Edition is our complete package that provides Accounting Professionals with a full suite of tools to manage their clients and practice.

MAINTENANCE PLANS

CLIENT TRACK 5.0

- Annual Maintenance Plans are included free of charge for the first year of your initial purchase of Client Track.
- Maintenance Plans are designed to provide you with high level of support you need from the start.

MAINTENANCE PLANS

CLIENT TRACK 5.0

- Annual Maintenance Plans are included free of charge for the first year of your initial purchase of Client Track.
- Maintenance Plans are designed to provide you with high level of support you need from the start.
- Offer two types of Annual Maintenance Plans :
 - **BASIC** : \$129.99 (per office)
 - **GOLD** : \$179.99 + plus \$60 for each additional license.

For more information on our Annual Maintenance Plans, please visit our web site at www.ClientTrack.ca.

CONTACT

CLIENT TRACK 5.0

- We provide high level of quality support to all of our Client Track customers.
- If you have any questions, suggestions, would like more information on Client Track or want to order a copy of Client Track, you can contact us in the following ways :

CONTACT

CLIENT TRACK 5.0

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- If you have any questions, suggestions, would like more information on Client Track or want to order a copy of Client Track, you can contact us in the following ways :
 - **Hours** : Monday to Friday : 9am – 5pm (EST)
 - **Toll-Free** : 1-866-423-8525
 - **Email** : techsupport@clienttracksoftware.com
sales@clienttracksoftware.com
 - **Web Site** : www.ClientTrackSoftware.com



Client Track

www.ClientTrack.ca

30
DAY

**FREE
TRIAL**

Download our no-obligation, 30-day **FREE TRIAL** version of Client Track 5.0 from our website at :

www.ClientTrackSoftware.com