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

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Searching for information

INTRODUCTION

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Trying to determine what needs to be done

INTRODUCTION

CLIENT TRACK 5.0

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Determining who's working on it

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 :

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.

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CLIENT TRACK 5.0

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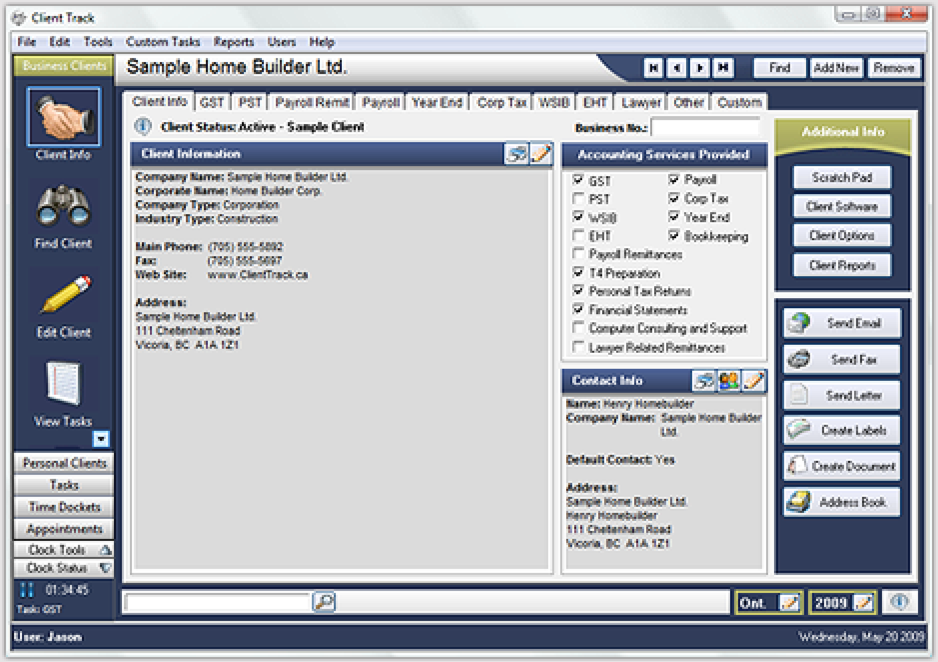
- Can track what projects your staff is working on and automatically notify your clients of upcoming deadlines.
- Streamline all of your office management tasks into one easy-to-use package
- Client Track is designed specifically for Accounting Professionals, so we take care of everything for you.

FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Client Information

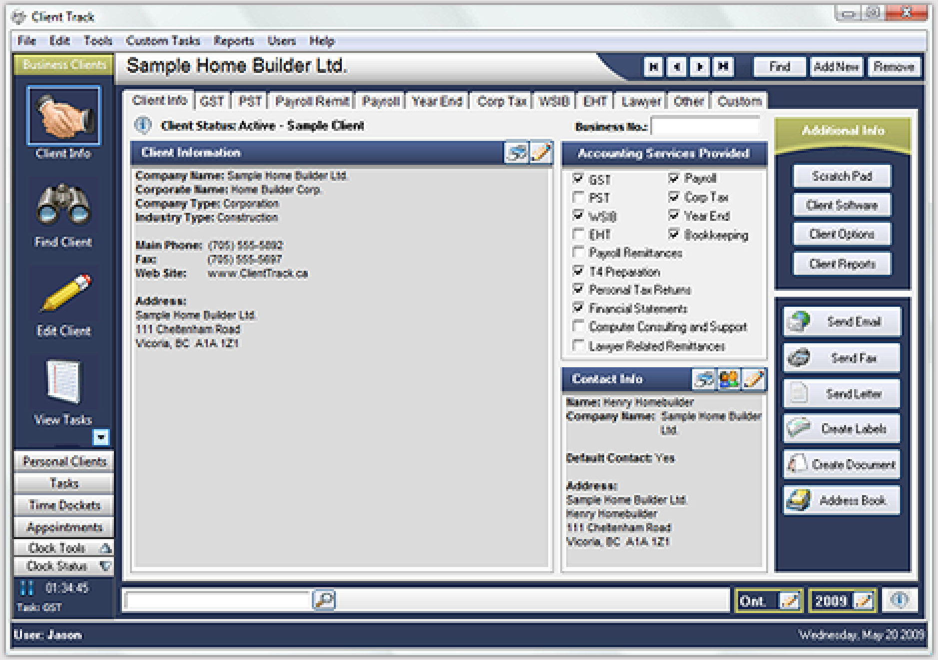


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Client Tasks

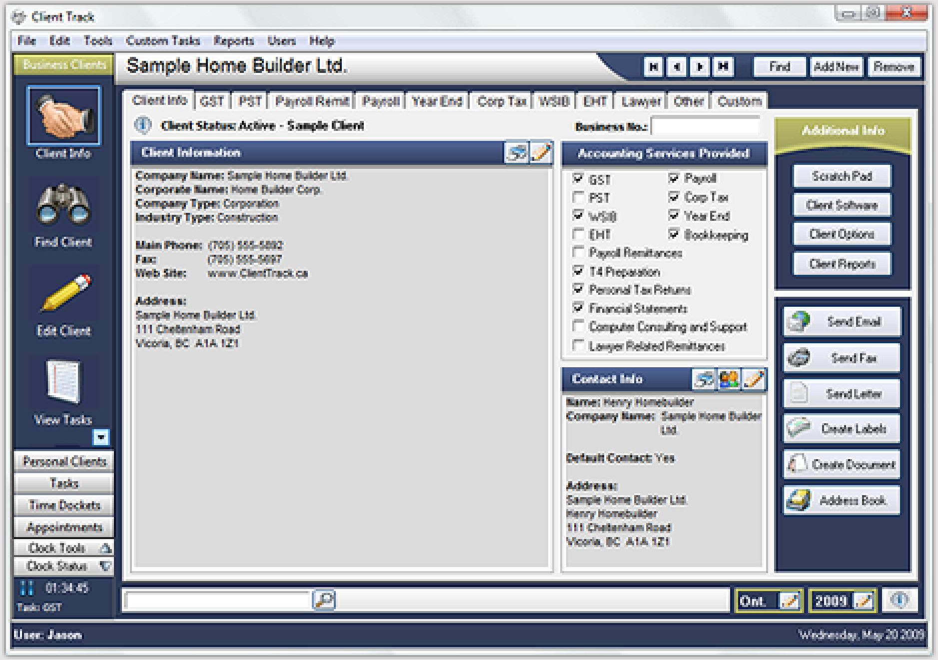


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Client Notification

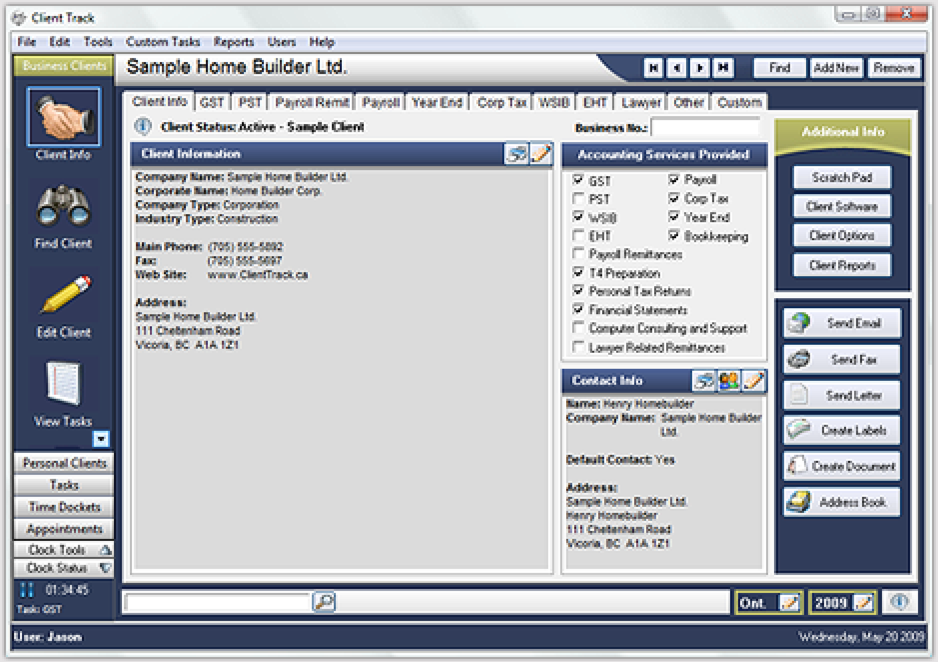


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Personal Tax

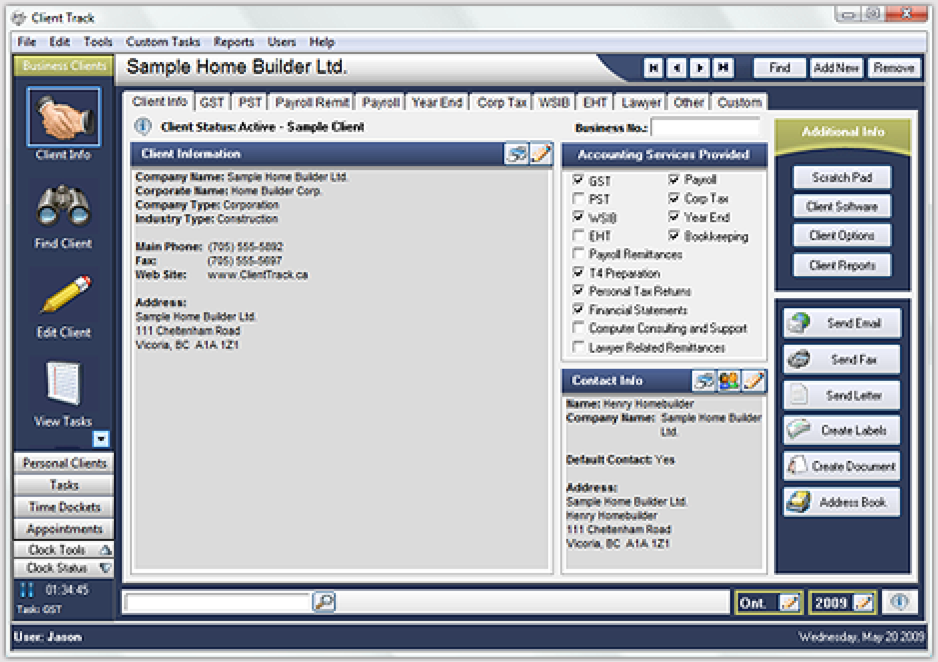


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Time & Billing

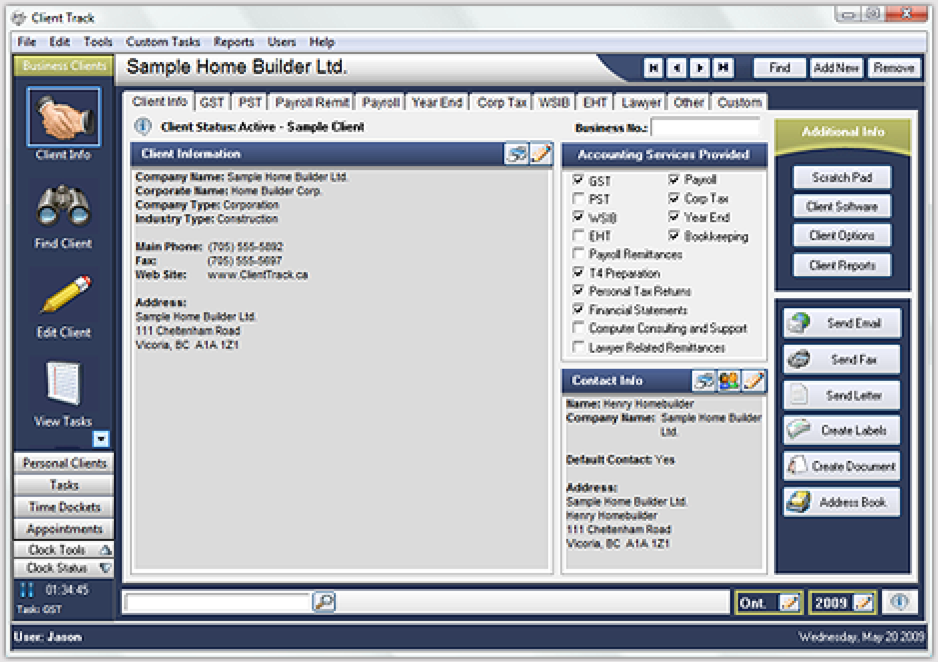


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Appointment Scheduler

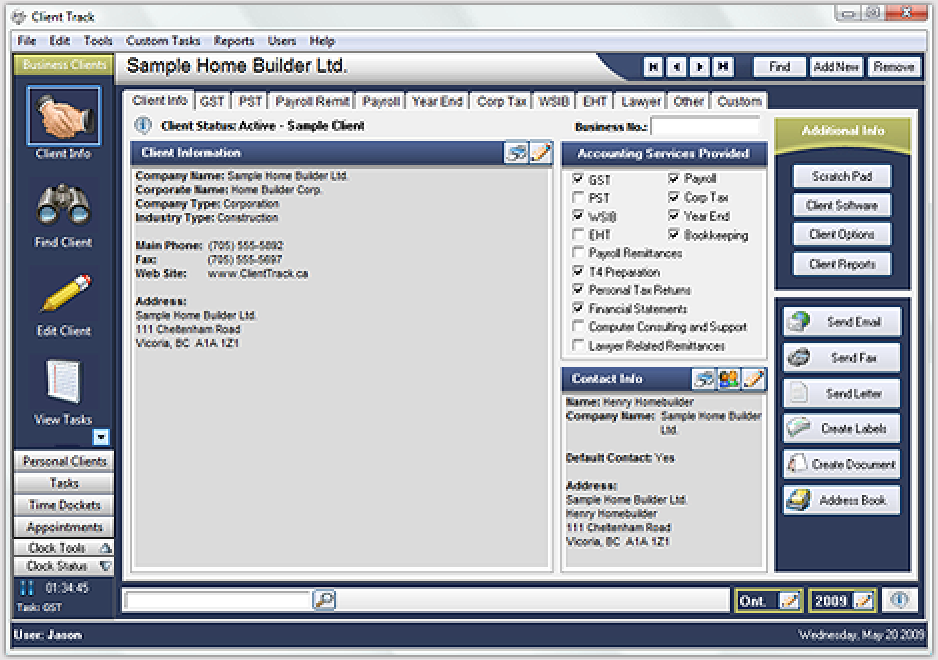


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Document Vault

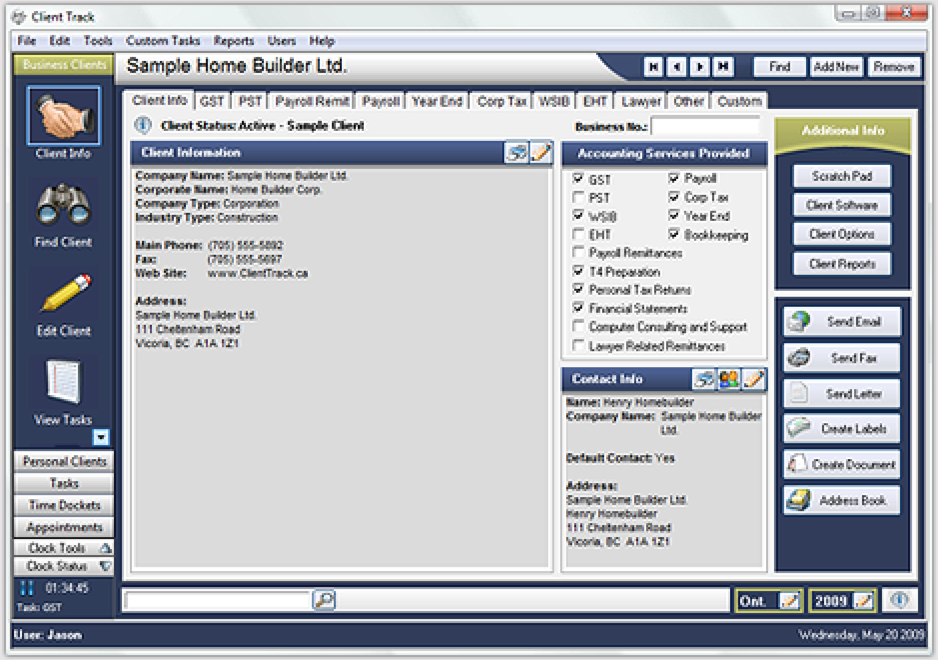


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Document Merge

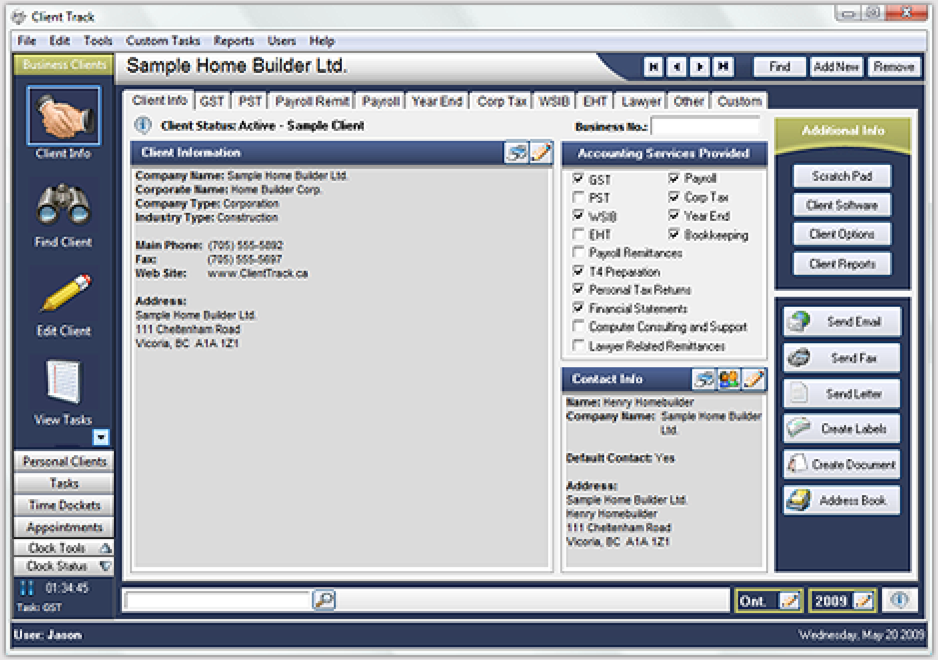


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

Label Merge

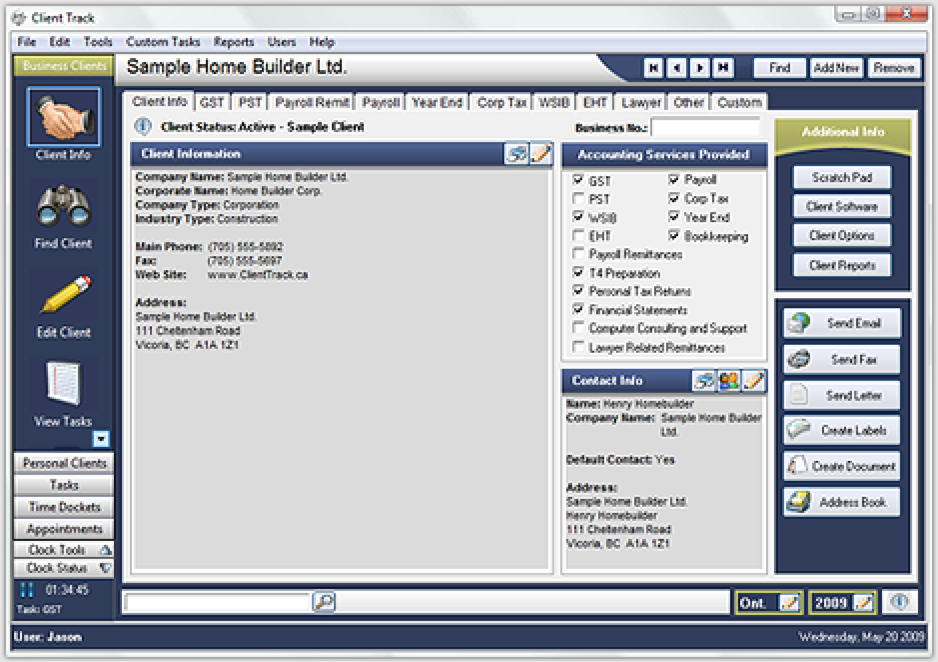


FEATURES

CLIENT TRACK 5.0

Client Track includes many features such as :

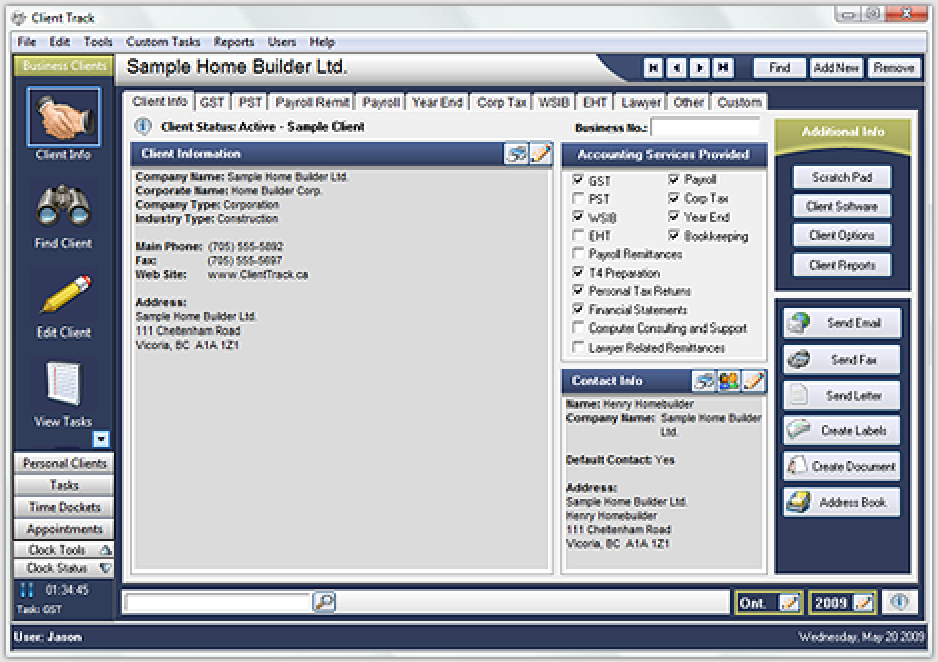
Reports and much more!



CLIENT INFORMATION

CLIENT TRACK 5.0

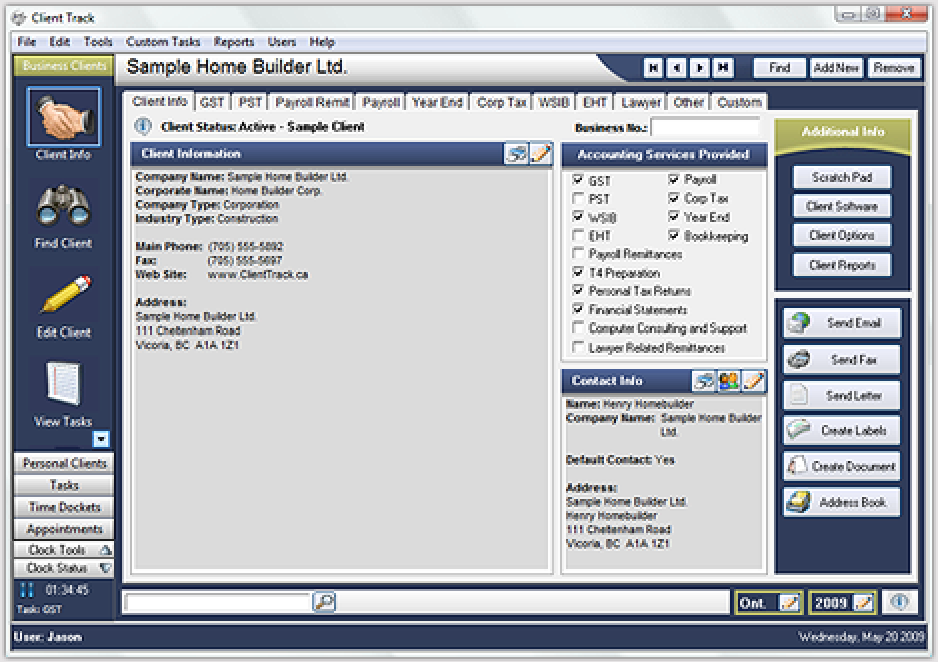
- Control your client's information with over 200 different information fields in Client Track.
- Record all of your client's business, accounting and personal information in one place.
- Add any additional information about your clients in the custom fields and in notes section.



CLIENT INFORMATION

CLIENT TRACK 5.0

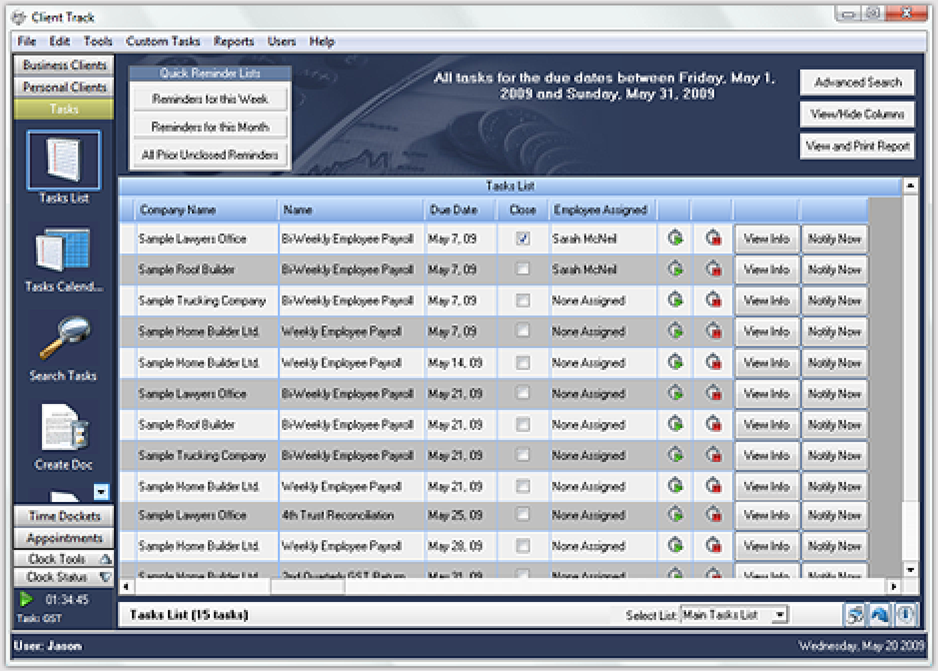
- Client Track is designed to be used on a network.
- Any changes made to your client's information is reflected across the network instantly.
- All information is searchable.



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.

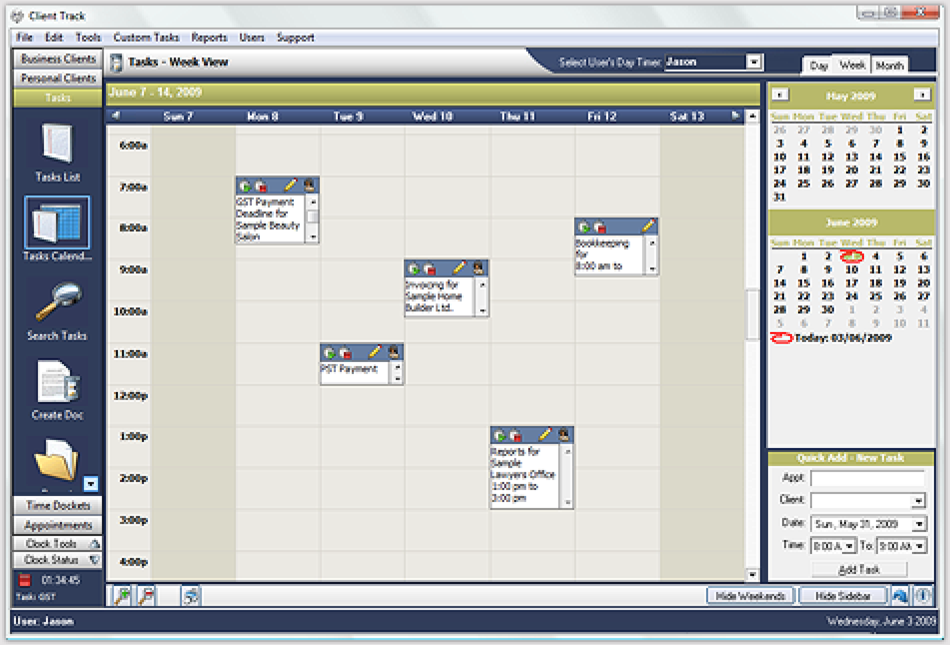


*AVAILABLE IN SMALL BUSINESS AND TIME & BILLING EDITIONS.

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.



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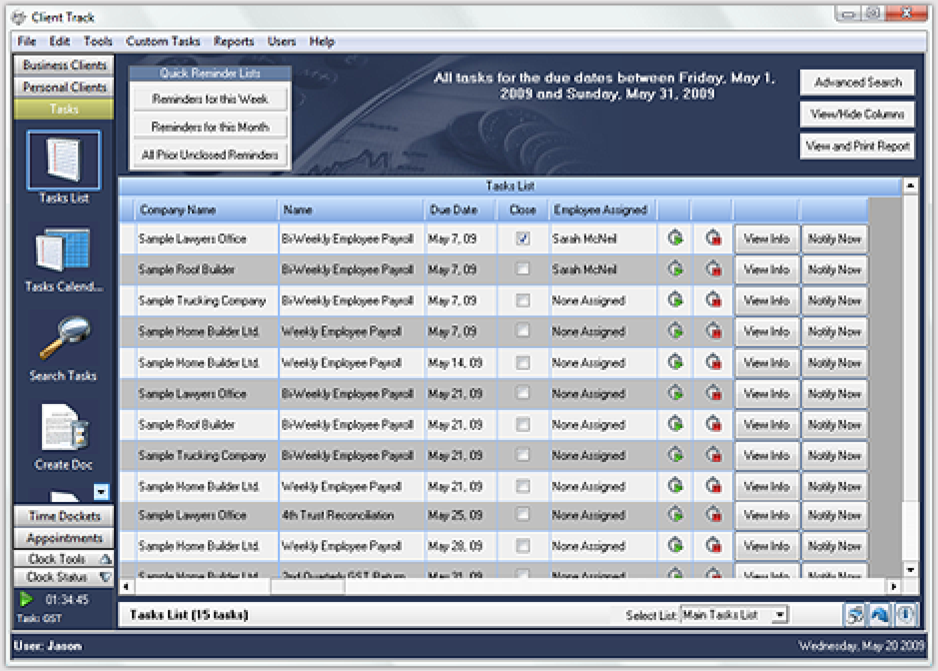
CLIENT TASKS *

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.



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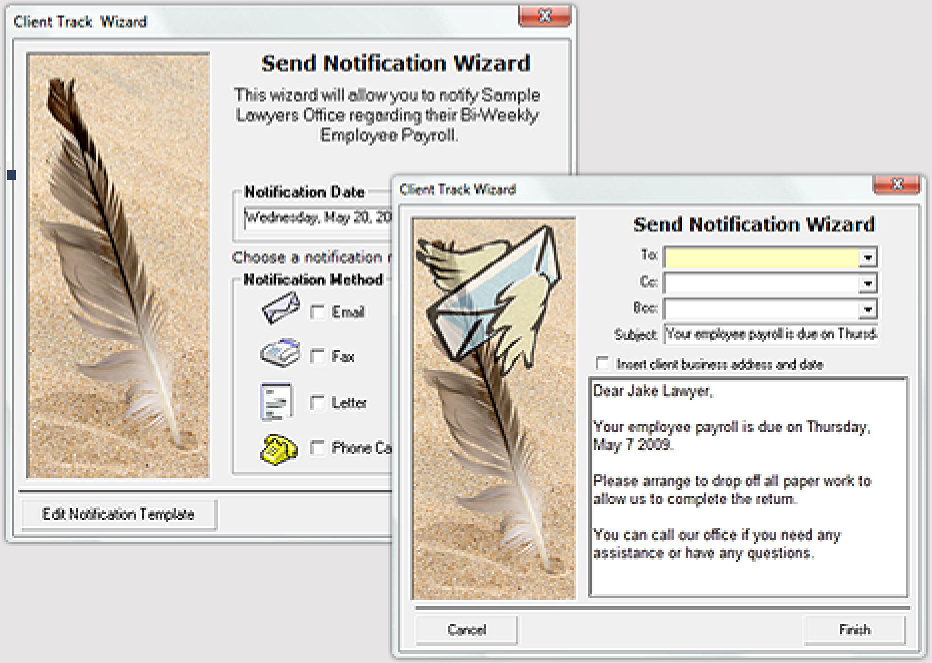
CLIENT NOTIFICATION

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.

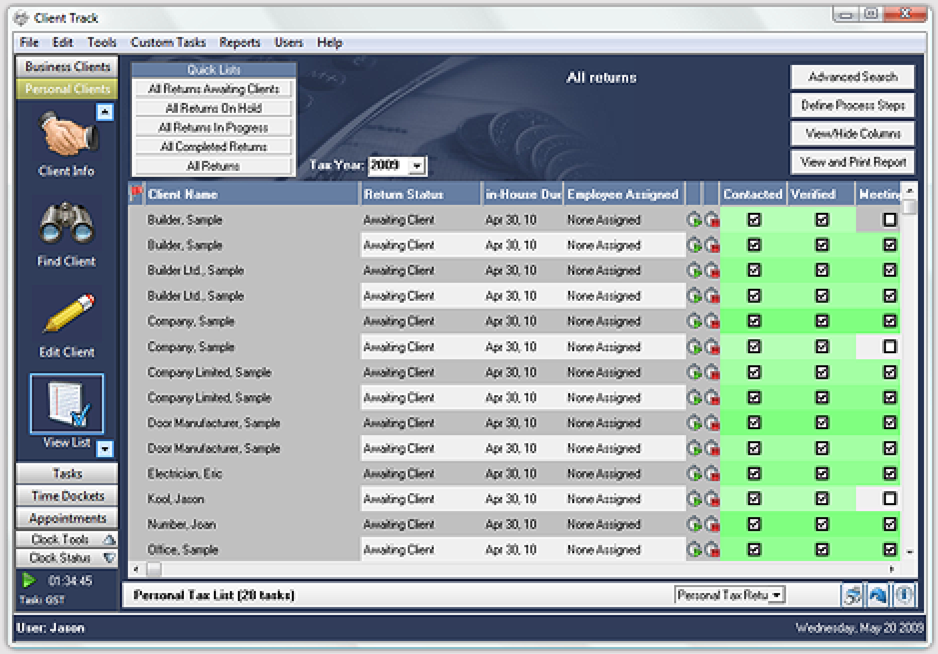


PERSONAL TAX

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



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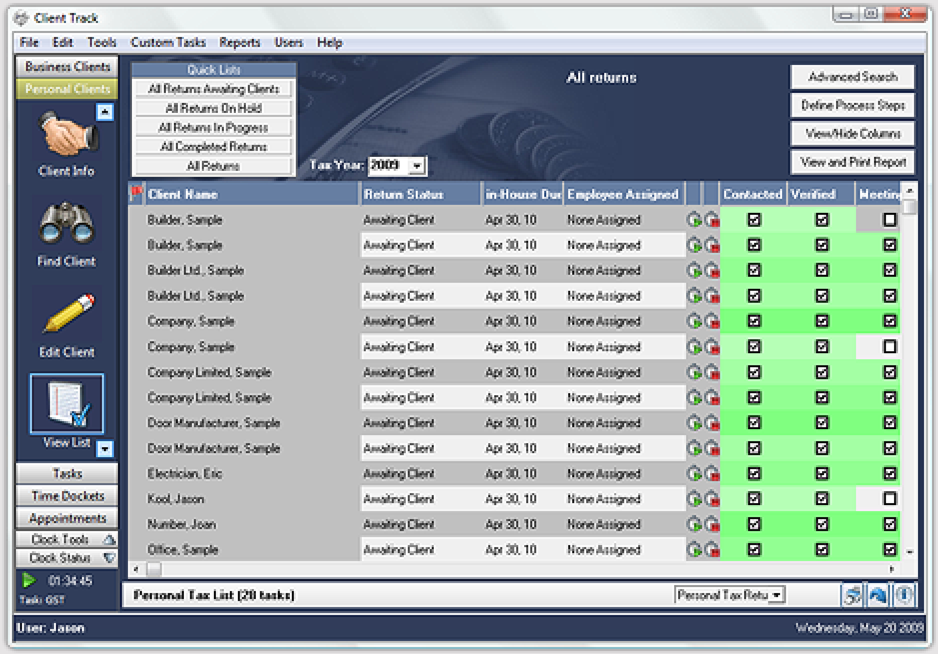
CANTAX



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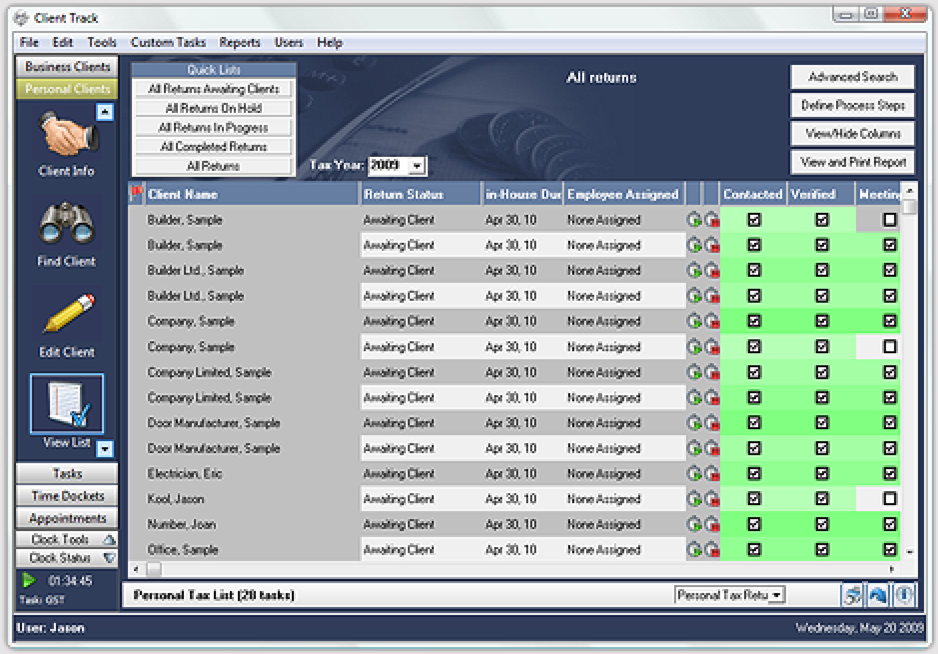
Dr.Tax



PERSONAL TAX

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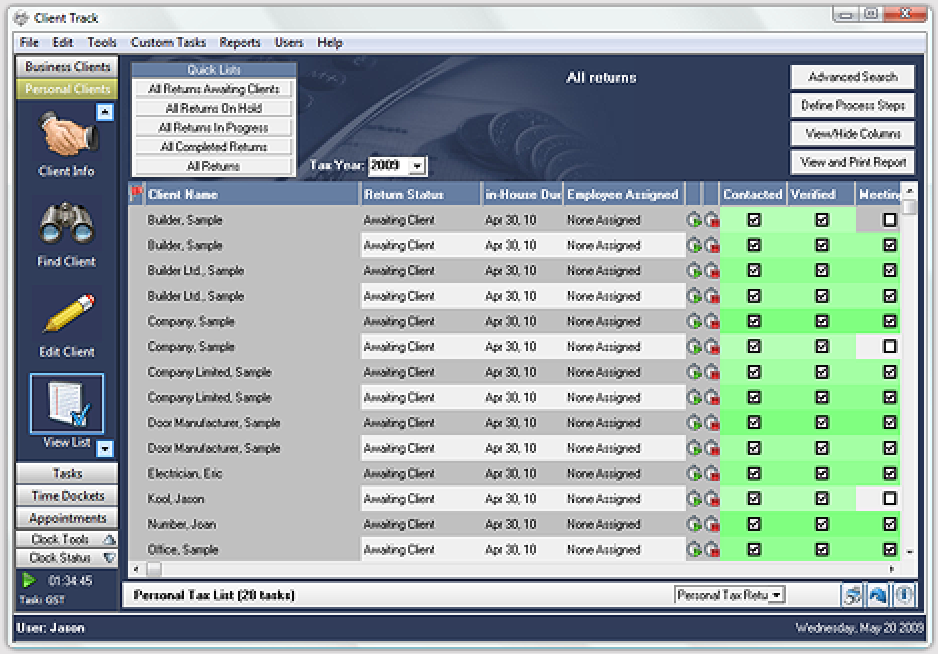
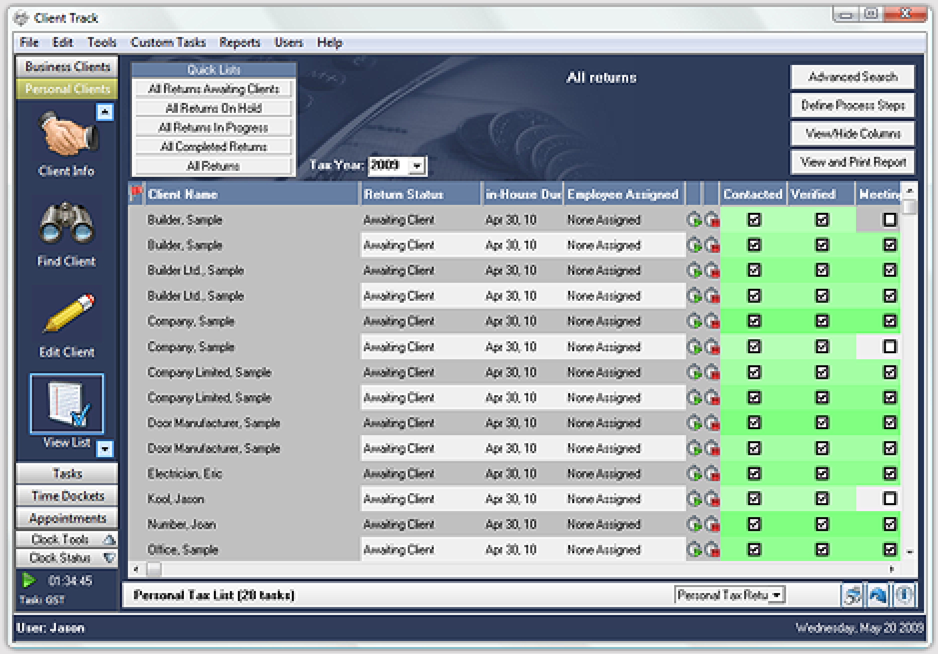
Text/CSV file



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.

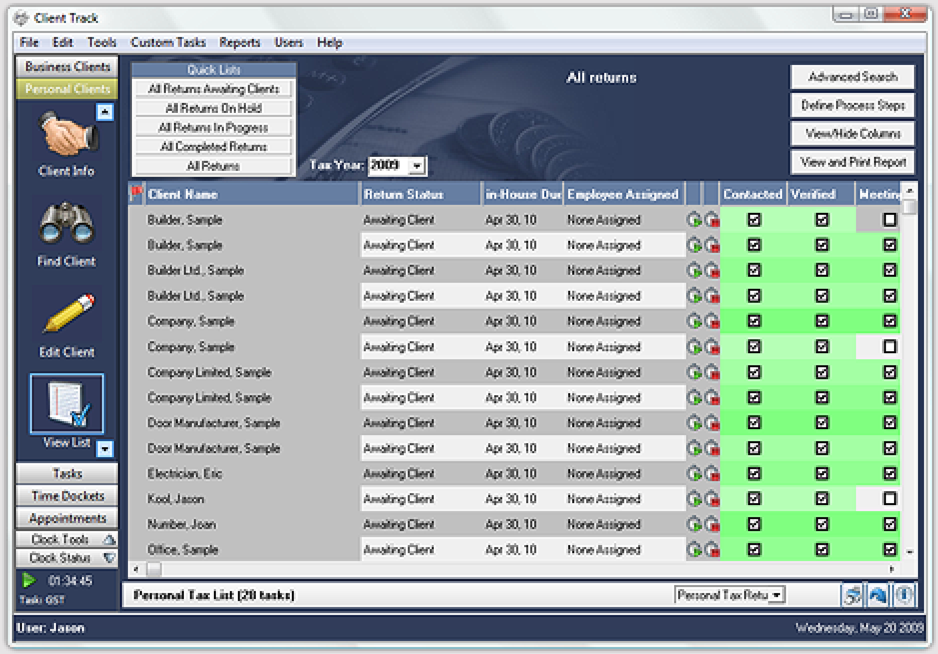


PERSONAL TAX

CLIENT TRACK 5.0

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

Who has brought in their information

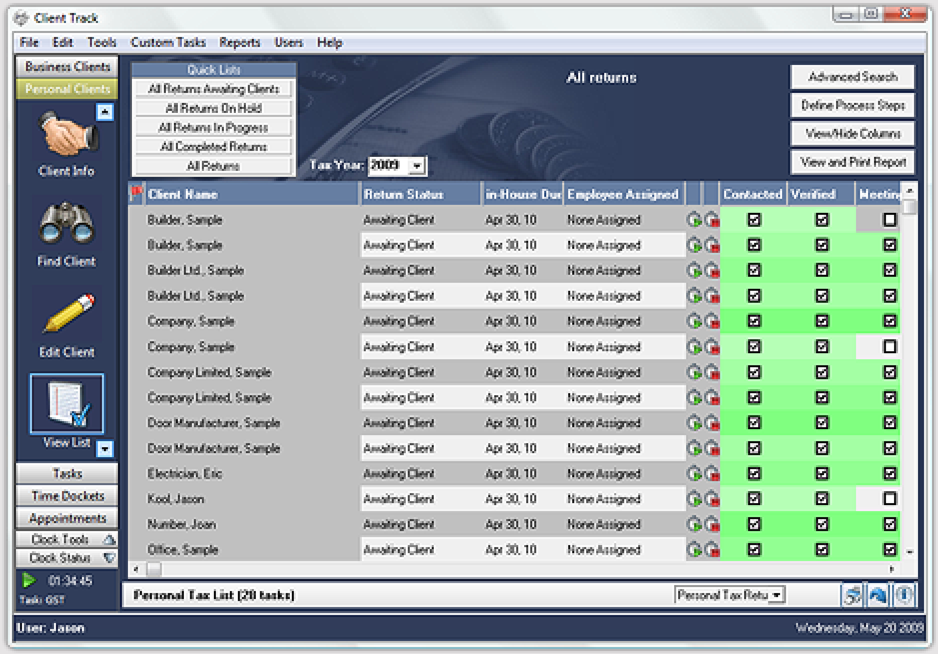


PERSONAL TAX

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.

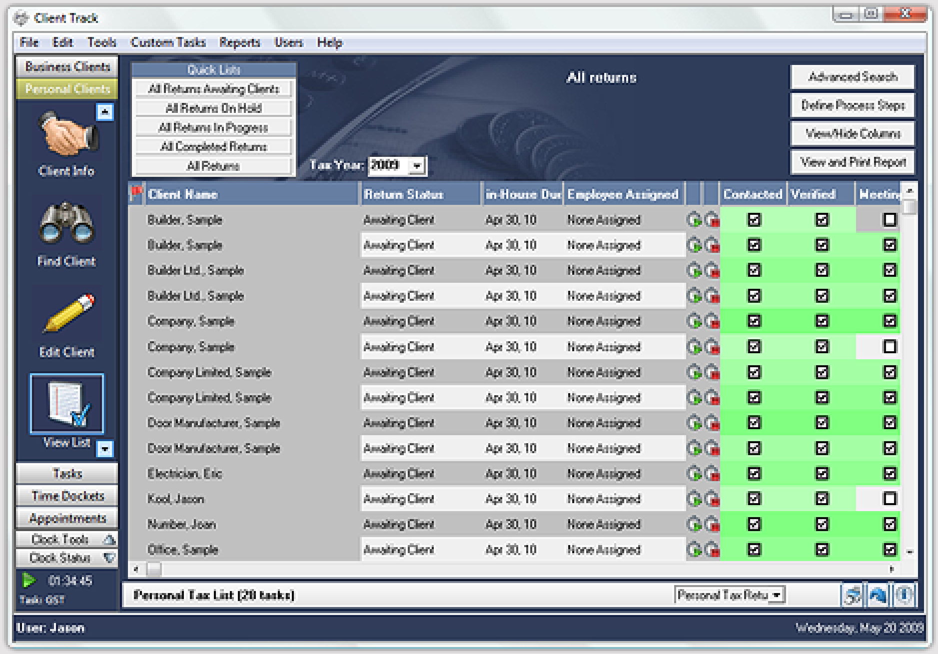


PERSONAL TAX

CLIENT TRACK 5.0

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

What the status of each return is

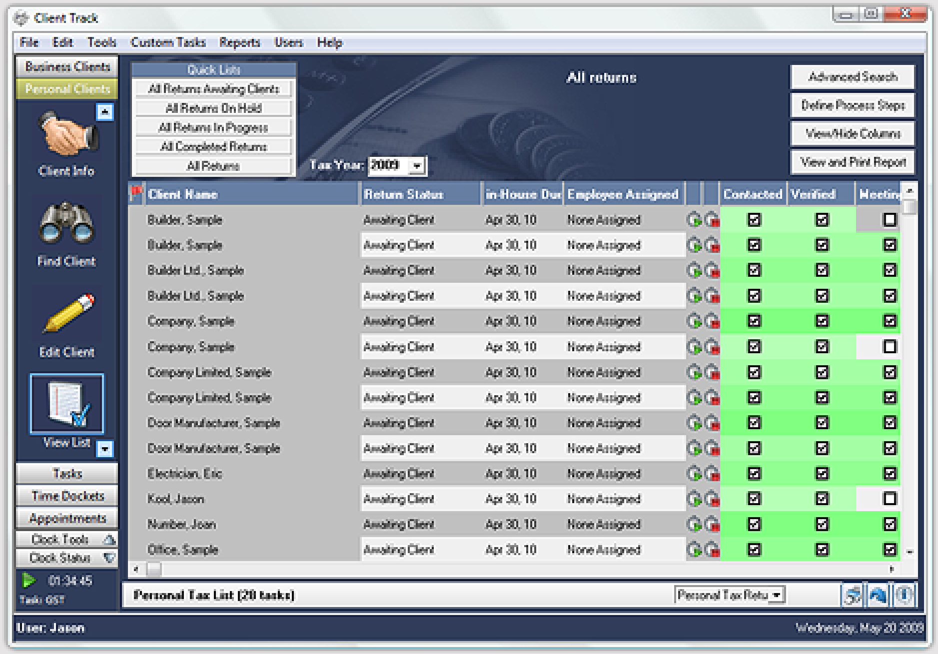


PERSONAL TAX

CLIENT TRACK 5.0

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

Where your problems are



PERSONAL TAX

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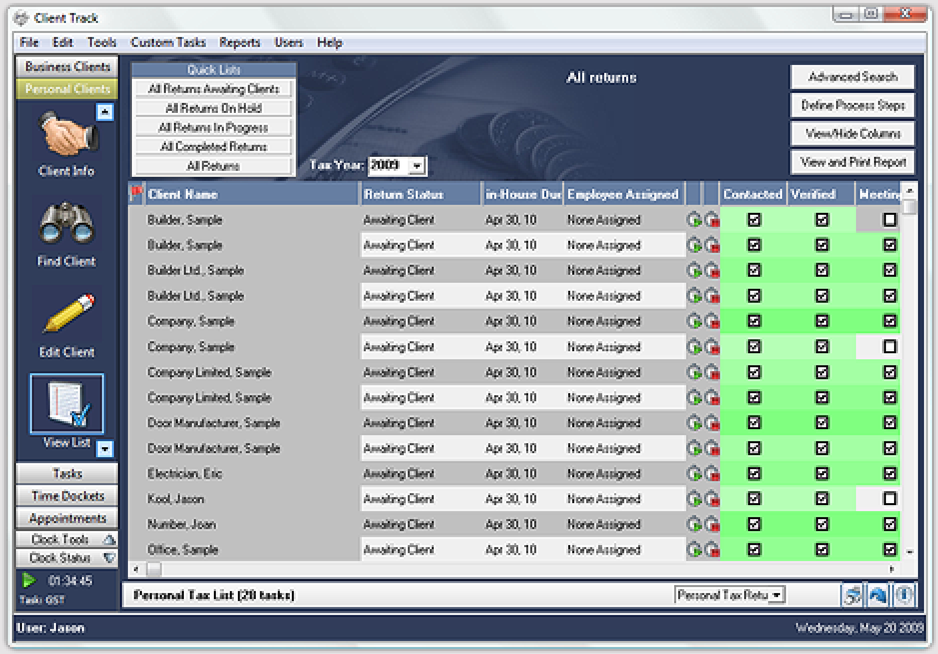
- With a complete list of personal tax clients, you can quickly view :

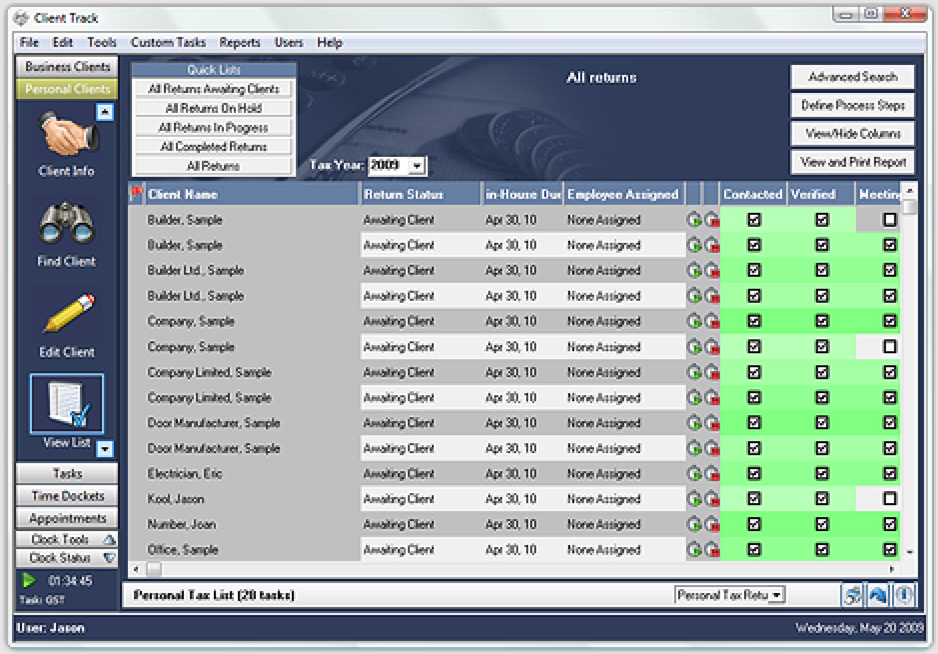
Who is working on it



PERSONAL TAX

CLIENT TRACK 5.0

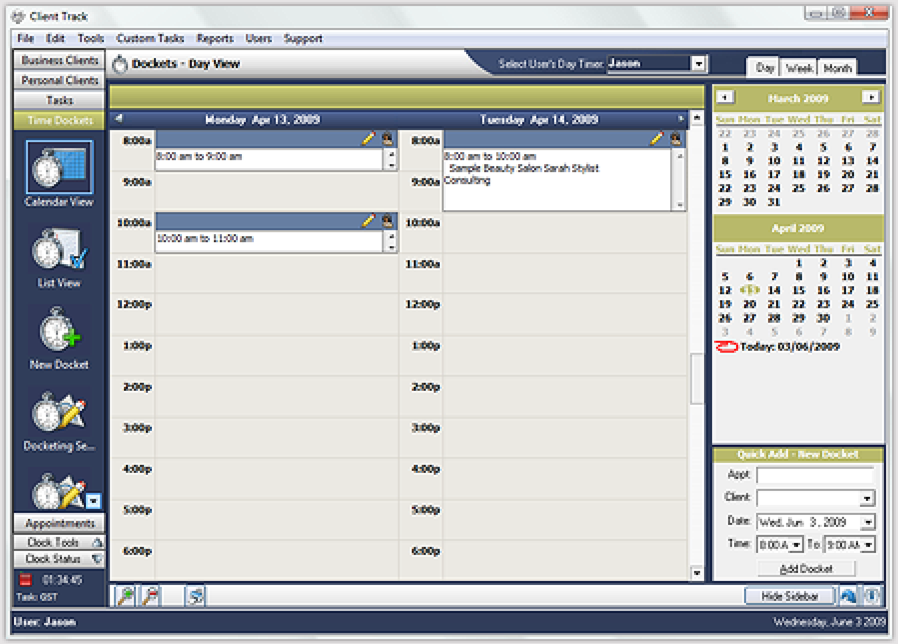
- Preparer can list any questions or record missing documentation required in Client Track for each personal tax client.



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.

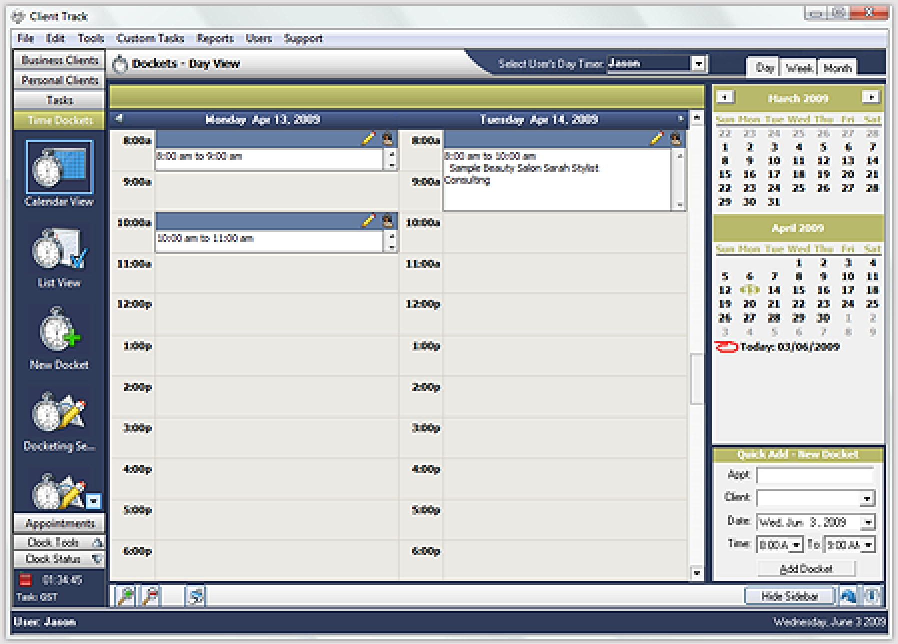


*AVAILABLE IN TIME & BILLING EDITION

TIME & BILLING*

CLIENT TRACK 5.0

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

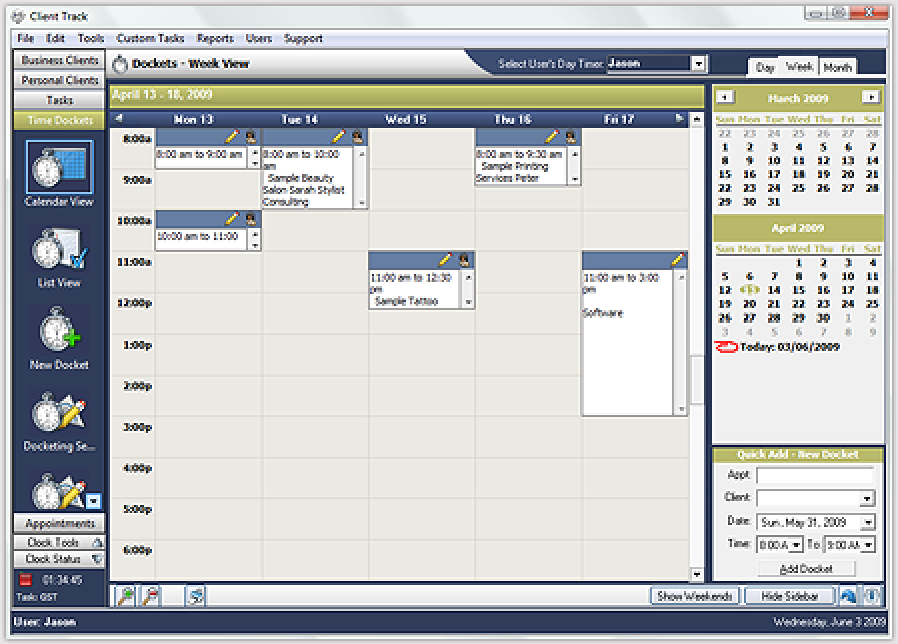


*AVAILABLE IN TIME & BILLING EDITION

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.

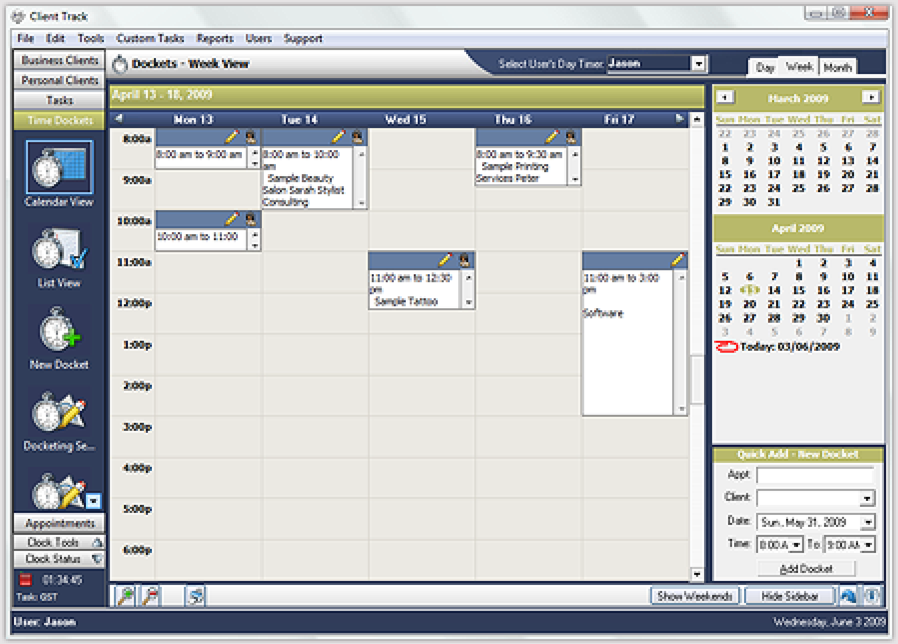


*AVAILABLE IN TIME & BILLING EDITION

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.



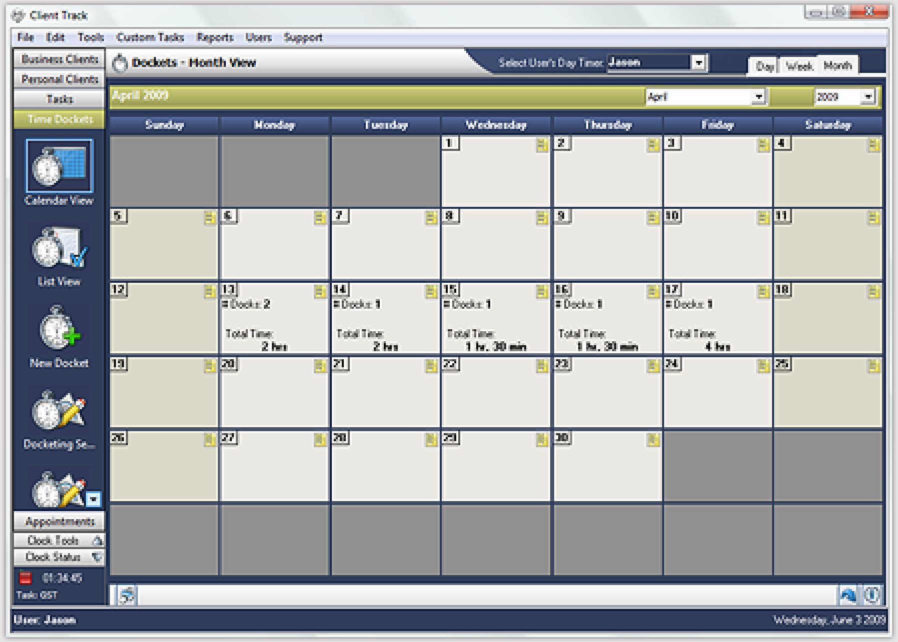
*AVAILABLE IN TIME & BILLING EDITION

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*

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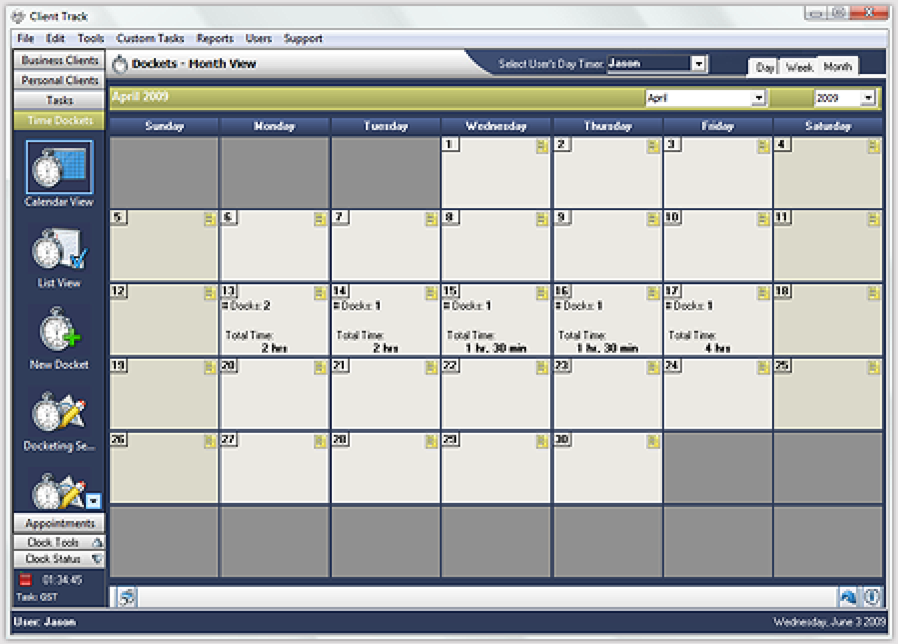
- Timers to record how long staff member is working on a task. When you click the start/stop timers on a task, Client Track knows :

Who the client is



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TIME & BILLING*

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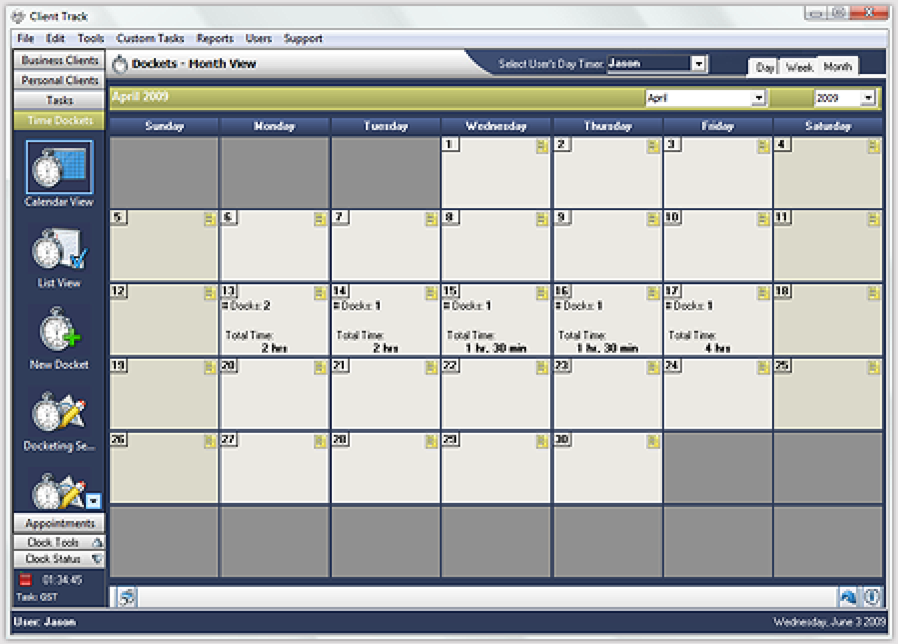
What the billing type/rate for staff is



*AVAILABLE IN TIME & BILLING EDITION

TIME & BILLING*

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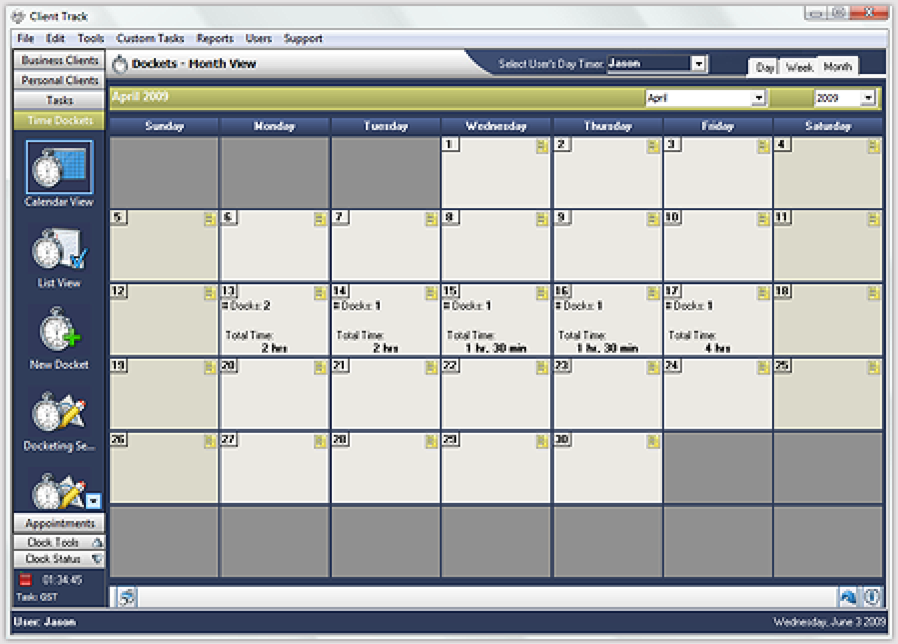
How long staff member(s) spent on task



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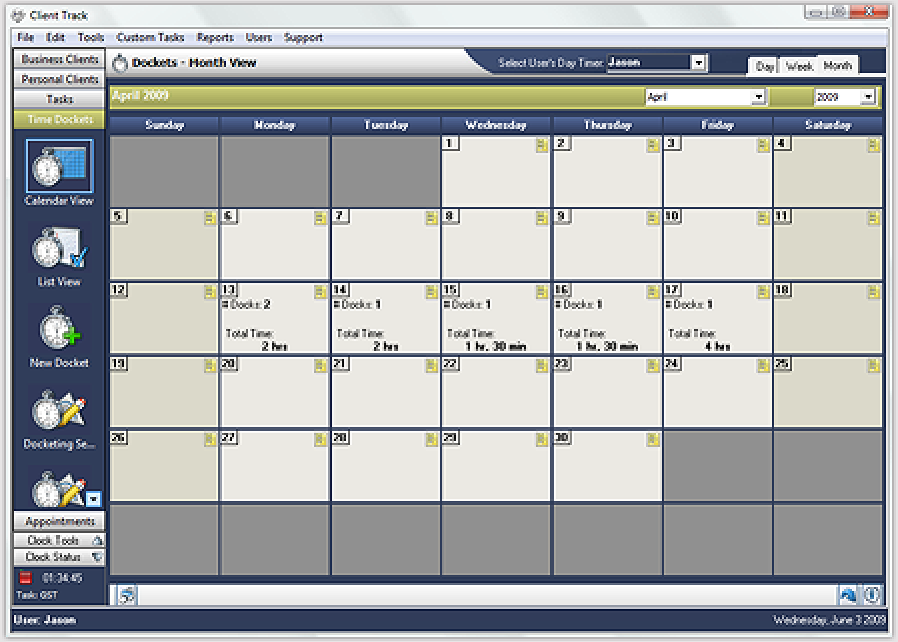
Description of work performed

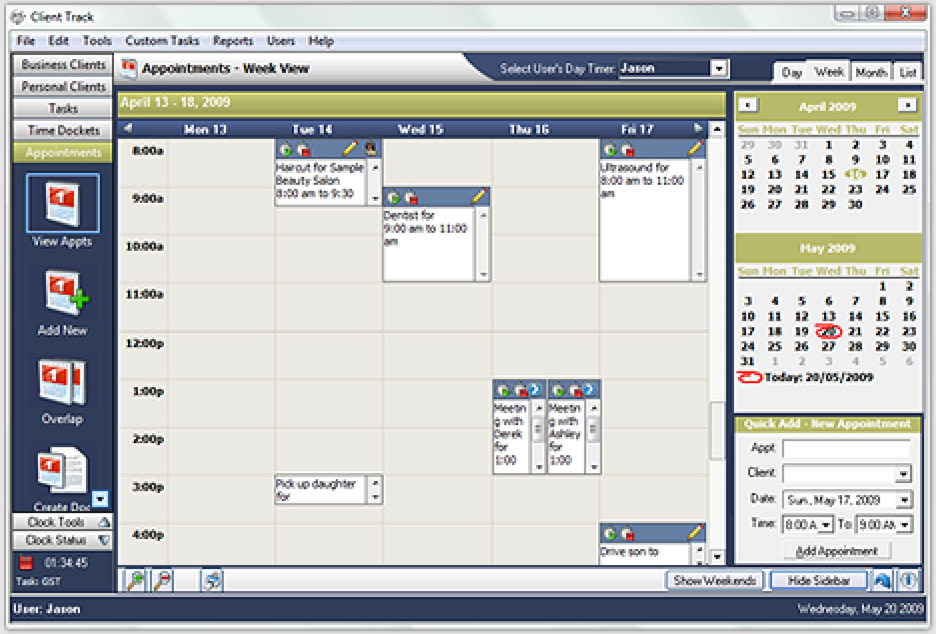


*AVAILABLE IN TIME & BILLING EDITION

APPOINTMENT SCHEDULER

CLIENT TRACK 5.0

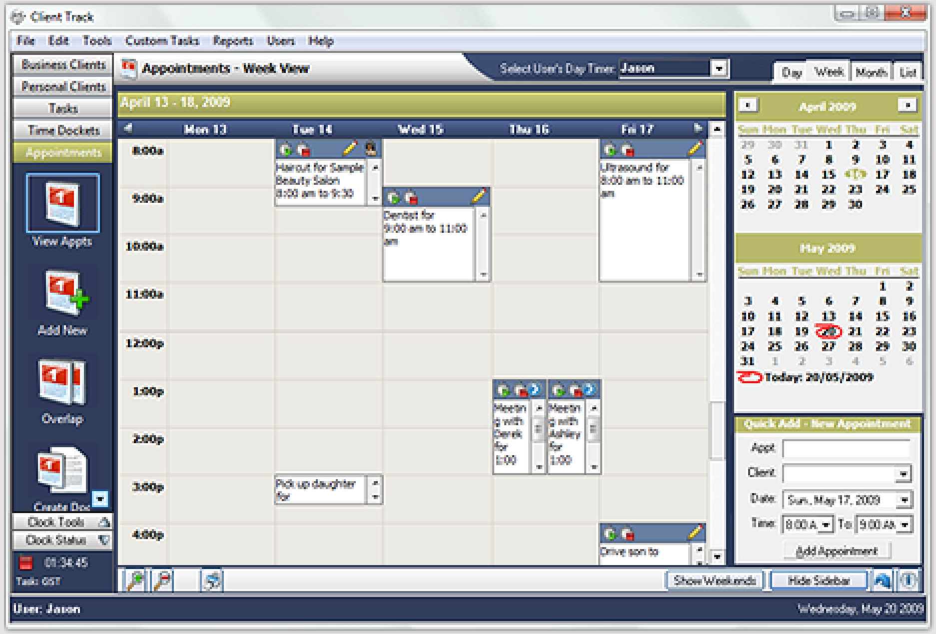
- Includes an easy-to-use appointment scheduler complete with multiple views.
- Client Track runs off a central database on your network allowing everyone to view and access each other's schedules.



APPOINTMENT SCHEDULER

CLIENT TRACK 5.0

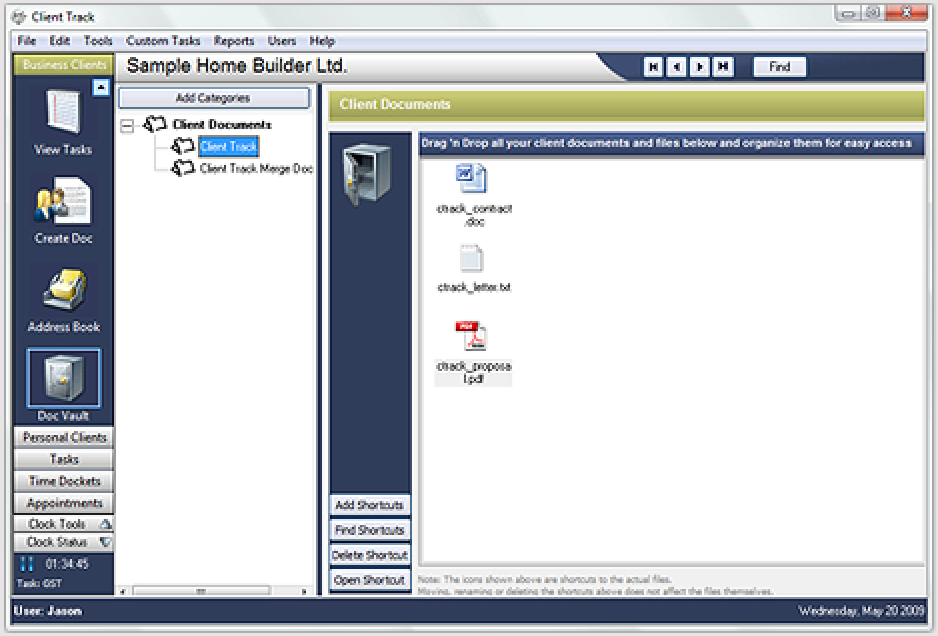
- Create repeating appointments and assign them to multiple staff members at once.
- Overlap Wizard allows you to overlap two or more staff's appointment schedules, allowing you to quickly see common available times.



DOCUMENT VAULT

CLIENT TRACK 5.0

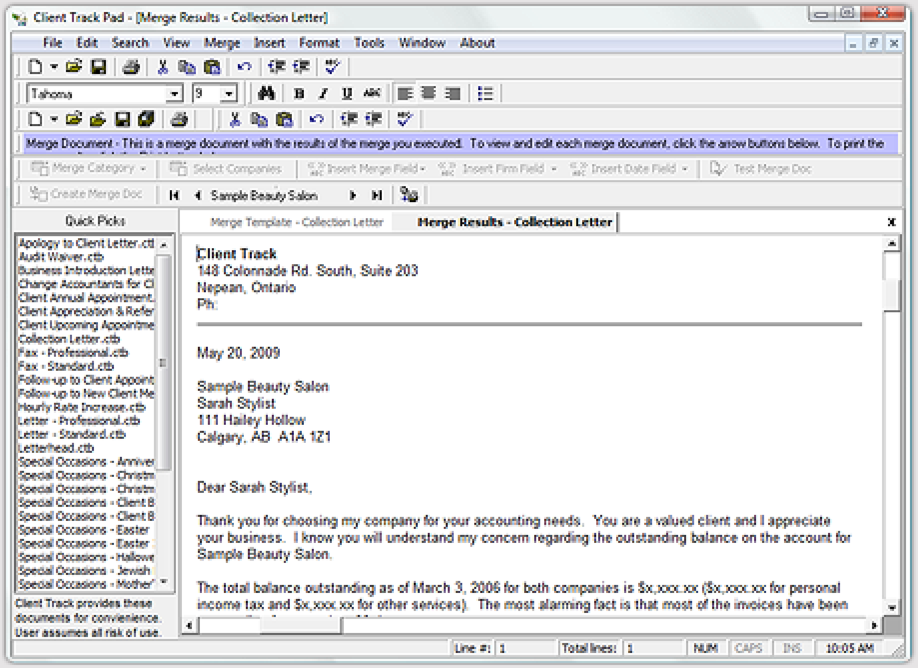
- Manage and organize your client's information.
- Records shortcut of original files
- Organize your clients' files into categories so all of your client's information is at your fingertips regardless of where your files are saved on your computer.



DOCUMENT MERGE

CLIENT TRACK 5.0

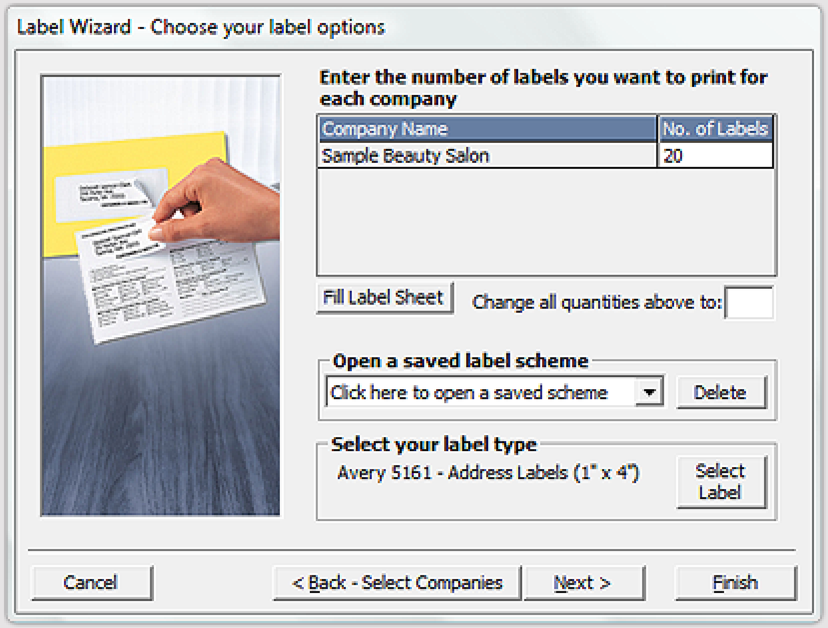
- Easily create template documents, letters and merge any of your client's information directly into the documents.
- Client Track will automatically save a copy of the merge documents to each client's Doc Vault.



LABEL MERGE

CLIENT TRACK 5.0

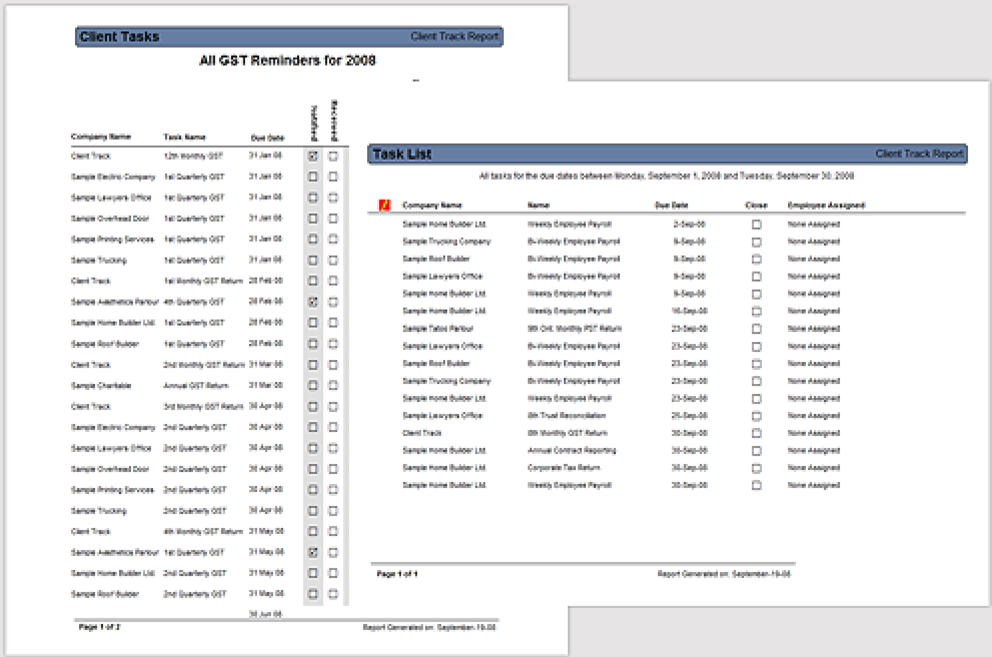
- Quickly create client and return labels based on any information fields you have in Client Track.
- Label Wizard allows you to save your label templates so you can print them in seconds for any of your clients.



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.



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.

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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.

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	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.

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- 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

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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 :

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  - 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