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automation and other features. The system offers excellent integration with QuickBooks, tying ...

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[\[Read more on CRM for accounting firms.\]](#)

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- Integration with QuickBooks, Outlook and email marketing solutions
- Online client portals, document sharing and management via integration with SmartVault and ShareFile
- Extensive tracking of client information, including contacts, billing, projects and notes

Potential Limitations

- The system itself is not cloud-based, although some of its integration options are.

Designed to fit various types of businesses, Results CRM offers comprehensive client management functions centered around the core contact database, which can track virtually any client information, including interactions (email, calls and scheduling), sales opportunities, projects associated with the client, documents, billing histories, notes and custom fields.

Functions most useful to professional services firms like accountants include project management, invoicing, receivables, scheduling and workflow automation. From within Results CRM, users can easily create estimates and convert them into sales orders, and sales orders can be synced through the integration with QuickBooks, along with payments and project cost management.

Likewise, the two-way integration with Microsoft Outlook ensures that client data is always up-to-date and old contact information doesn't stay active. Outlook calendar items and information also synchronize with Results CEM and users can view prior interactions, files, documents and other data from within client histories. The program's integration with Constant Contact simplifies email marketing campaigns. Its integrations with SmartVault and ShareFile enable secure, cloud-based storage and collaboration with clients. Since the system is not web-based, this may also be a firm's preferred method of working on files when away from the office.

Summary & Pricing

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Firm Management

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