



Efficiency in today's economy is critical to all businesses, so we've developed a tool to help deal with the stresses of Customer Relationship Management. Specifically designed for the payroll industry, CRMLink gives you instant access to vital information regarding your clients. With completely customizable features, this application can be automated to inform you about client needs and opportunities. CRMLink is ideal for companies that want to build reports and dashboards around their client data. With the ability to build workflows, trigger emails, collect data from your website and so much more - - we are certain that CRMLink can bring value to your company.

Tax Notice Management

Store and track all related correspondence and easily manage trends and potential issues.

Sales Force Automation

Track your pipeline, generate quotes and provide detailed information to prepare for future workloads.

Green Document Storage

Store all of your documents in our online virtual filing system, that can be arranged and searched by client data.

Notifications and Alerts

Automate email notifications to staff and clients based upon custom workflows, specific actions or calendar based events.

New Management Areas

Gain control of client NSF, weekly payroll processes, year-end processing and conversions.

Put **CRMLink** to work for you!

What is CRMLink?

- A customizable Customer Relationship Management system written for the payroll industry; written by payroll industry veterans.

How can CRMLink help your business?

- Maintains clear and consistent communication with clients using templates, tasks and reminders.
- Automates the sales process with forecasts and opportunity management.
- Efficiently scans and stores tax notices, sends updates within your organization (and to clients) and completes the process through to abatement.
- Provides the ability to quickly see who is utilizing your services.
- Assigns complexity ratings to clients and scores your CSR averages to ensure service is not compromised.
- Integrates a customer support portal into your website so clients can submit and track their issues.
- Collects payroll changes and sends emails to your clients when complete.

Questions & Answers about CRMLink

Can I customize CRMLink?

- Absolutely, CRMLink is truly a completely customizable application. Add fields, remove fields, build workflows and email notifications – easily! CRMLink's customer portal can be completely embedded into your existing site.

Can I generate quotes and maintain quotas?

- Yes, CRMLink has a complete Sales Force Automation system to track performance. Use CRMLink to automate quote generation using HTML merge.

What if I need a custom report?

- CRMLink allows any user to build custom reports quickly and easily. You can also schedule reports to run on a regular basis and automate repetitive tasks.

How are we billed?

- You are billed per service bureau user per month. Fees include portal access and unlimited customers on the system.