PP PRACTICE PORTAL

One streamlined system for all your data, at a glance

Introducing, Practice Portal...

When you manage complex data and critical tasks for a whole range of clients, being able to find the right information fast is a powerful advantage. Practice Portal empowers your practice to do just that, and it's already changing the way accountancy firms work, right across the UK.

Practice Portal is a unique tool that pulls together full client data from all the systems you use, at the click of a button. So when your clients call, you can instantly see, on a single screen, the status of their projects, the last documents you exchanged, how much they owe you and more. But that's not all. Practice Portal also helps you work in a smarter, more streamlined way. You can schedule tasks for yourself and others, monitor your team's progress and even track new sales opportunities, all from one clear, clutter-free dashboard. It's a simple, cost-effective way to improve productivity, cut confusion and make your clients happier.

Bringing your favourite tools together

Our roots lie firmly in accountancy and law, so we understand your challenges and we know which applications you use, day in, day out. We've developed Practice Portal specifically for practices like yours. It seamlessly integrates with industry-leading applications for practice management, tax, and HR, as well as HMRC and the Government Gateway.

Using the portal gives you clear, centralised access to all the tools you rely on, as well as enabling you to analyse and compare data from across your systems. It's a highly efficient way of working, designed to help you identify patterns, opportunities and inconsistencies faster than ever.

"It's taken away the headache of using lots of systems and made things so much easier"

Jamie Gladstone,
Partner, Price Bailey LLP

Maximise your return on CRM and reduce your cost footprint

Practice Portal allows a firm to see a summary of all interactions with their clients, but without having to invest in the full licence fee of an Enterprise CRM like Salesforce. Practice Portal provides the perfect way to put the right tools in the right hands at the right price.

Fast, intuitive implementation

Our expert team can integrate Practice Portal into your systems without disrupting your workflow. They'll link to your core systems, completely connecting.
Even better, because Practice Portal is so intuitive to use, you'll find your whole team gets up and running incredibly quickly, realising its potential and reaping the benefits.

Key features

Integration
We'll integrate Practice Portal with your main databases and systems, for easy, joined-up working.

Email connections
Integrates seamlessly with Microsoft Outlook and Microsoft Exchange Server.

Team directory
A company-wide staff directory, linked to your practice management and HR systems.

Cost saving
Allow staff to see a summary of all interactions with their clients while simultaneously reducing significant CRM investment.

Always up to date
Technology never stands still, so every time we add new features, these will be included in your subscription.

Clutter-free controls
Our clean, clutter-free dashboard makes it easy to see everything, at a glance.

Smartphone-friendly
You can use Practice Portal on your desktop, tablet or smartphone wherever you are.

Task management
Create and allocate tasks across the practice, so you never lose track of progress.

Connected CRM
Includes client relationship management functions, so you can easily track new opportunities.

White-label branding
We will give Practice Portal a look and feel that is sympathetic to your branding making it easier for users to adopt.

Who is Practice Portal for?

We've developed Practice Portal specifically for professional firms and it's already making a valuable difference to some of the Top 50 accounting practices in the UK.

Of course, every practice is different, so we're here to make it work for you, connecting to the systems you depend on every day and enabling your entire team to work in a more synchronised, profi table way. Practice Portal provides a single, trusted, easy-to-navigate dashboard of client data, including:

✓ Contact details
✓ Live projects & actions
✓ Tax details & returns
✓ Statutory information
✓ Meeting & call notes
✓ Key documents
✓ Prospect pipeline

Price Bailey LLP

The Practice Portal interface has been a real win for us. Not only is it intuitive and easy to use, having a single point of access into all of our key underlying client, staff and CRM data has made a real improvement to the efficiency of our work.

It's a user friendly access gateway into underlying software, pulling information directly out of our core software systems and presenting them in a unified dashboard. So for the first time, from a single screen we can view, and then drill into, all of the information we hold on a client, regardless of where this information is held across multiple software packages across the practice, which is more convenient saving us time and resource.

Jamie Gladstone, Partner

How much does it cost?

Practice Portal is all about clear, straight-forward ways of working.
Which is why we keep our pricing structure simple too.
We're always upfront about our fees, with no hidden extras.

There's nothing quite like seeing a system for yourself, so our experts are always happy to come to your premises and show you how Practice Portal could work for your practice.

£10
Per user, per month

+ VAT, plus installation and training.

Book your free demo today

If you'd like to arrange a free demonstration, just talk to our team or visit our website.

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