sage HandiSoft

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Practice Manager

Management of: clients, documents, team diaries, jobflow, downloads and security.

Take control of your practice

HandiSoft Practice Manager comprises three components that make it easier to perform day-to-day tasks.

- Contact Manager
- Jobflow Manager
- Security Manager
- Download Manager

Client Centric

Practice Manager provides a convenient and easy-to-use control centre for launching your HandiSoft applications. Click a module tab to view a summary of key information relevant to that client. For example: view WIP and billing details under the Time+Billing tab; or tax form status under the HandiTax tab, ASIC forms pending lodgement under the HandiRegister tab...
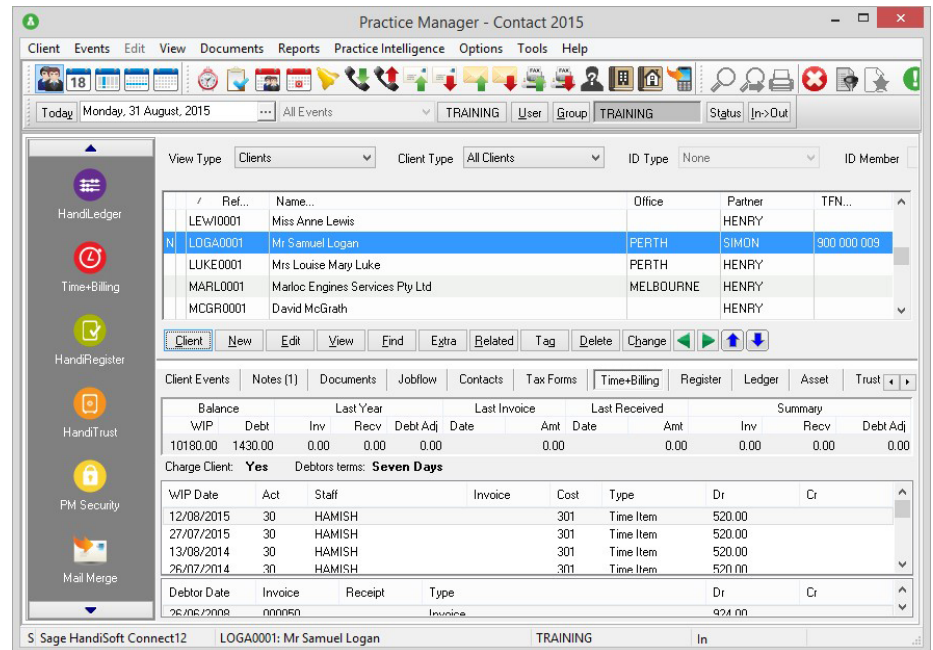
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1. Contact Manager

Contact Manager is a complete desktop information package that includes: client relationship management (CRM), client, prospective client and contact databases plus integrated electronic diaries.

Key features

- Record and review history of client interactions, including: appointments, emails and phone calls.

- Timers to record the duration of phone calls or other activities.

- User-definable fields facilitate powerful, database filtering for marketing purposes.

- Quick Launch Panel to your HandiSoft modules (including previous years' HandiTax or other installed applications).

- Open and view multiple ledgers or tax returns simultaneously.

- Master deletion or editing of client details, such as changing reference codes.

- Displays thumbnail client information stored in your other HandiSoft modules. Then double click to drill down into that module.

- Optionally transfers diary events and chargeable phone calls to timesheets.

- Add your own data fields for marketing purposes.

- Annual leave planner.

- Shared and individual diaries, "to-do" lists and reminders.

- Calendar and contact data synchronisation with Microsoft Outlook and PDAs.

"Practice Manager gives us a single screen summarising everything that is happening across the firm - when a client phones, it takes just a couple of mouse clicks to view any aspect of the work we do for them."

Lily Moran, Partner -Moran Chartered Accountants

2. Jobflow Manager

Jobflow Manager makes it simple to monitor your practice's workflow by job, task, due date, staff member, manager, or partner. Jobflow Manager can identify resource bottlenecks and alert you so that you can set realistic target dates and, if necessary, take remedial action to ensure that tasks are completed on time.

Key features

- Interacts with Document Manager, allowing checklists and procedures to be attached to a Jobflow Manager task.

- Automatic alerts allow you to deal with bottlenecks before they become problems.

- Graphical display of tasks enhances management visibility.

- Real-time view of how work is progressing together with a percentage of completion.

- Display jobs coloured by Date, Status or No colour.

- Archive completed jobs.

- Display outstanding tasks in your Practice Manager diary. synchronisation with Microsoft Outlook and PDAs.

3. Security Manager

Security Manager's simple interface gives you precise control over the specific activities that staff members can perform with each HandiSoft module, and on which clients.
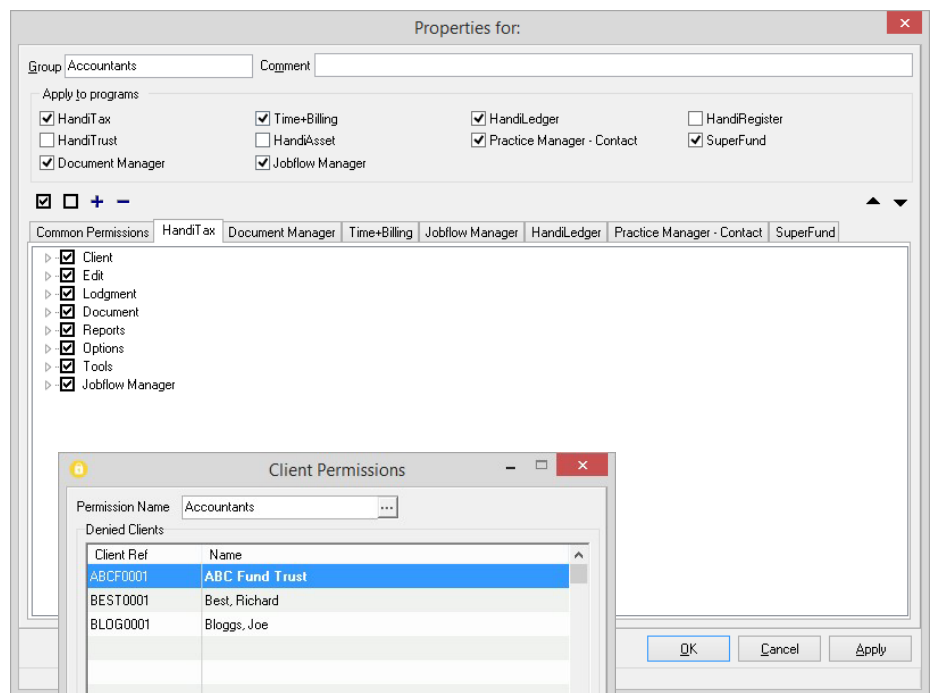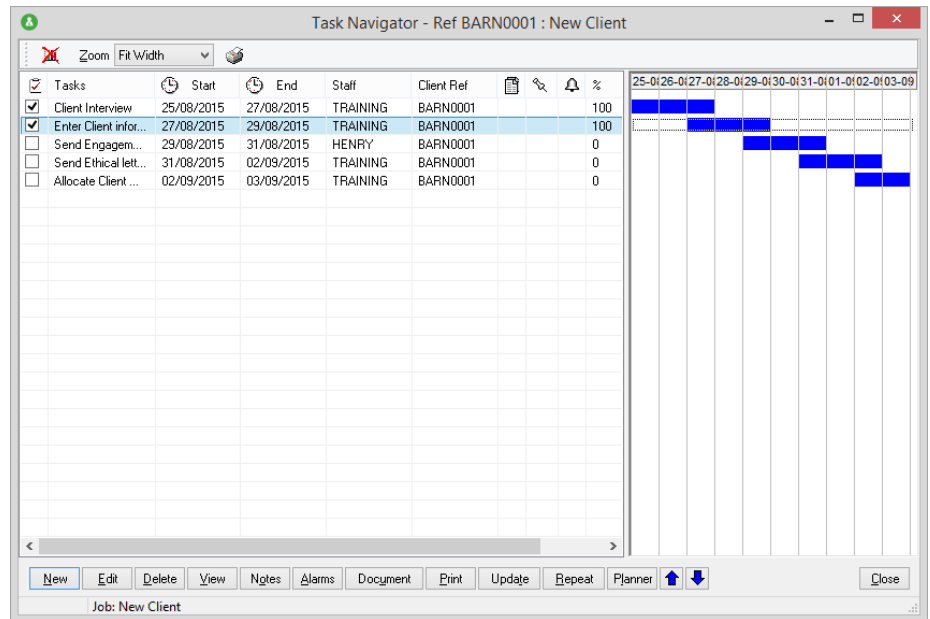
Key features

1. Complete lockdown of all confidential practice data.

2. Restrict access to modules and even features within the modules for individuals or groups of users.

3. Restrict access to selected clients. Hide partners' returns and your practice's accounts from general view.

- The Activity Monitor displays who is currently running each module and records each action they perform.

- Log Viewer reports changes to data, detailing "who", "what" and "when".

4. Download Manager

Download Manager manages the essential function of keeping your HandiSoft software up to date, using your internet connection. Simply click to view the available updates to your licensed modules and then download them in the background without interrupting the work you are doing.

Key features

- Instant view of all your licenced program versions and status (installed, available for download, and ready for installation).

- Easy control of program installations.

- The Security Manager and Download Manager combination can be purchased as a separate module (independently of the Practice Manager).

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	Practice Management	Compliance	Services	Client Use	Cloud-connected Modules
Connect	✓				☁
Practice Manager	✓				
Time+Billing	✓				
Document Manager	✓				
Client Portal	✓				☁
Best Practice	✓				
Practice Intelligence	✓				
HandiTrust	✓				
Notify	✓				☁
HandiSecurity	✓				
Wage Easy	✓			✓	
HandiTax		✓			
Sage One		✓			☁
HandiLedger		✓			
SuperFund		✓			
BankFeeds		✓			☁
Workpapers		✓			
HandiRegister		✓			
Point&Claim		✓			☁
HandiAsset		✓		✓	
PrivateCloud			✓		☁
DataSecure			✓	✓	☁
Sage One Accounting				✓	☁

For more info, visit: www.sagehandisoft.com.au
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