



# *ftw*Client Manager: Demonstration of Upcoming Workflow Software

Presented by:  
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# Session Notes

- Interactive – Please stop us at any time to ask questions.
- All Feedback Welcome – Client Manager has been developed from the suggestions of our customers and those in the industry. We love feedback and work very hard to incorporate your suggestions in to our software.
- Beta Software – We are currently in Beta testing for this software. We are working with customers to ensure the product is most useful to them. If you would like try out the software in Beta, please contact Jared or Joe.

# Topics Covered

- New User Interface
- Client Manager Dashboard
- Plan Specifications
- Client Manager CRM
- Batch Features
- Time Tracking/Management Reports
- Billing Integration
- Questions

# Questions

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## Jared's Contact Info:

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# Continuing Education

*Please* – before you leave:

## 1. Sign in

- Verify your attendance
- Check the box if you want your attendance reported to IRS (for ERPA reporting and those with a PTIN only)

## 2. Pick up your certificate of attendance

- Certificates will not be emailed after the conference

