



## Business Phone System for Accountants

**A fully-managed phone system in the cloud.** Focus on what's important. Move your business forward.



**MOBILITY**



**SECURITY**



**SCALABILITY**

**Accountants require a reliable, secure, and efficient communication system to manage their daily operations and client interactions. A business phone system can help accounting firms improve client communication and streamline internal processes.**

For accountants, clear and seamless communication is essential for providing excellent service. A reliable business phone system offers the tools needed to handle client inquiries, collaborate with colleagues, and manage time-sensitive tasks. Whether managing client calls, coordinating with your team, or setting up consultations, a business phone system keeps your firm connected and efficient.

Features like call forwarding, voicemail-to-email, and conferencing help accounting firms stay organized and responsive, reducing communication delays, enhancing client service, and maintaining a professional presence.

# Accountants

Cloud-based phone systems are an ideal solution for accounting firms looking to optimize their communication tools. Offering scalability and cost-effectiveness, these systems allow firms to grow without the burden of managing physical phone lines. With advanced features like call recording, voicemail transcription, and auto-attendant, cloud phone solutions provide accounting firms with the flexibility to maintain peak efficiency and keep communication seamless, all while staying within budget.

## Powerful and Secure

A hosted phone system equipped with a comprehensive suite of enterprise-grade features offers accountants the robust capabilities needed to effectively support each client's dynamic financial and accounting requirements. This advanced communication solution provides the flexibility and scalability to handle complex client interactions, manage detailed financial discussions, and adapt to evolving business needs. By leveraging these powerful tools, accountants can ensure that their services remain responsive, precise, and aligned with their clients' changing demands.

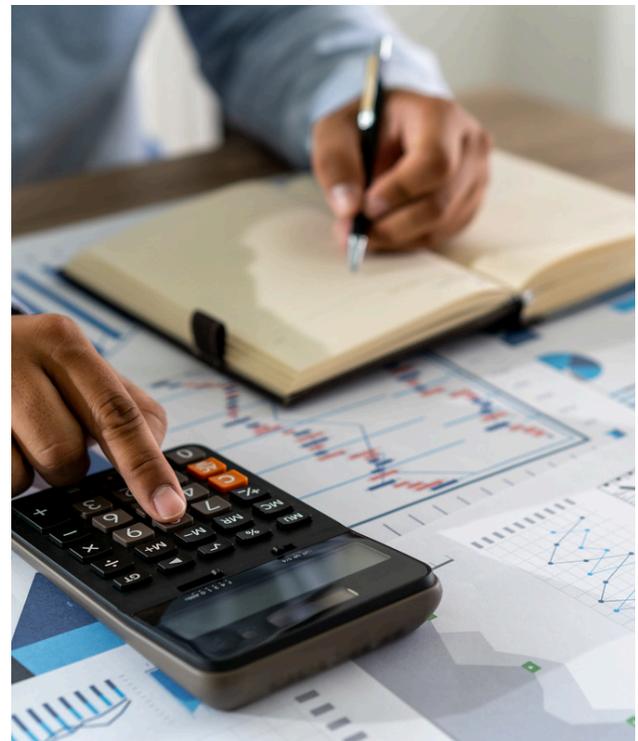
## Key Features:

**Click-to-Dial** - Enhance your efficiency by initiating calls with a single click. This feature eliminates the need for manual dialing, allowing you to connect with clients and colleagues quickly and effortlessly.

**Auto-Attendant** - Serve as a virtual receptionist for your firm, automatically screening and directing incoming calls to the appropriate extension. This ensures that every call is handled promptly and efficiently.

**Cloud Faxing** - Experience secure and paperless faxing with our cloud-based solution. Efficiently manage and store faxed documents, reducing paperwork and enhancing data security.

**Voicemail-to-Email & Transcription** - Stay connected and organized with voicemails transcribed into text and delivered directly to your email inbox. This feature allows you to read and respond to messages more efficiently, even when you're away from your desk.



## Key to Your Accounting Firm's Success

As your accounting firm expands, so will your team, and scaling your communication infrastructure should be seamless. With a hosted phone system, growing your business is straightforward—there's no need for additional phone lines or extensions.

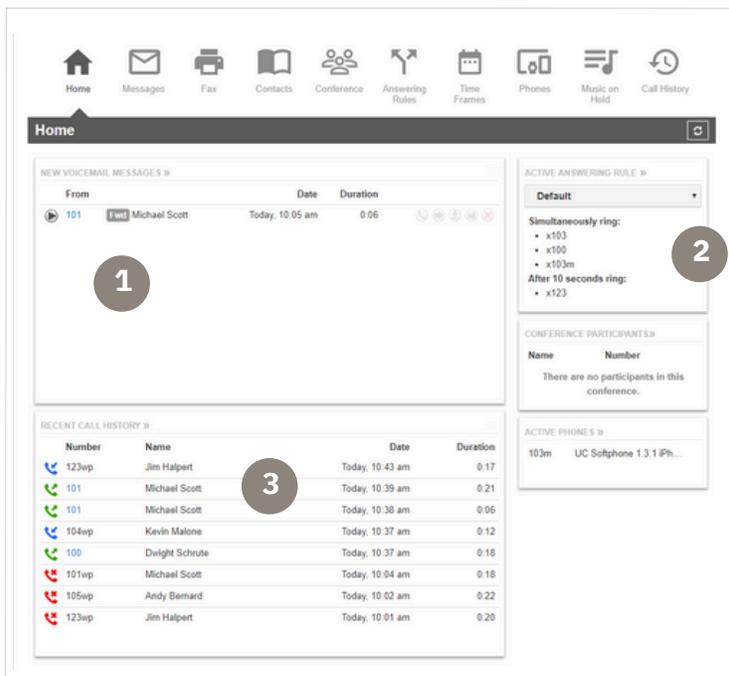
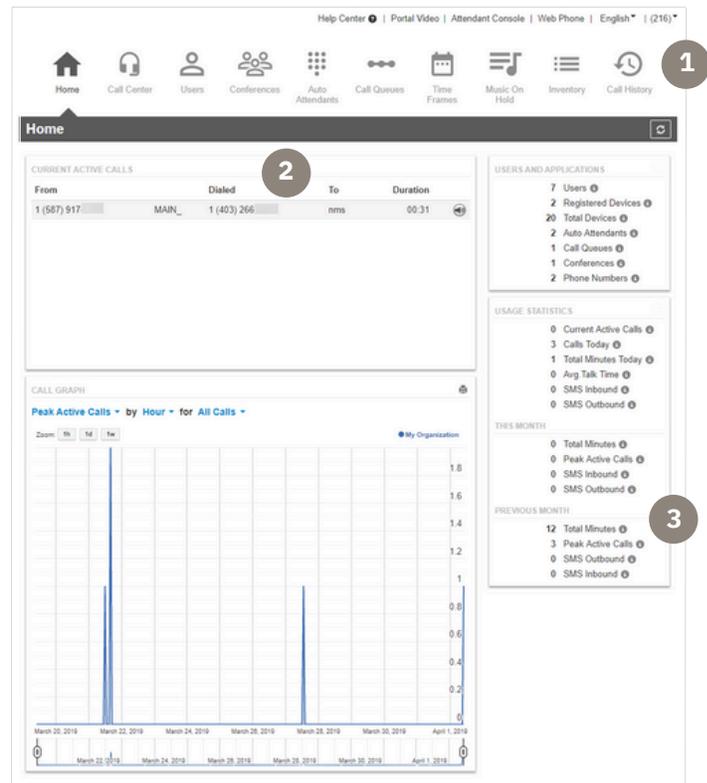
Our cloud phone solution operates on a private, secure, and reliable network, utilizing industry-standard security practices to safeguard your data. This robust protection not only secures sensitive information but also helps you build and maintain client trust.

Position your accounting firm for success with our hosted phone solution. Reduce operational costs, enhance your professional image, and ensure exceptional service with every client interaction.

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## Management Portal

- 1 Full Call History
- 2 See Active Calls in progress
- 3 Brief Statistics
- Add/Manage and Delete Users
- Add/Manage Auto Attendants
- Manage Schedules
- Manage Music/Messages on Hold

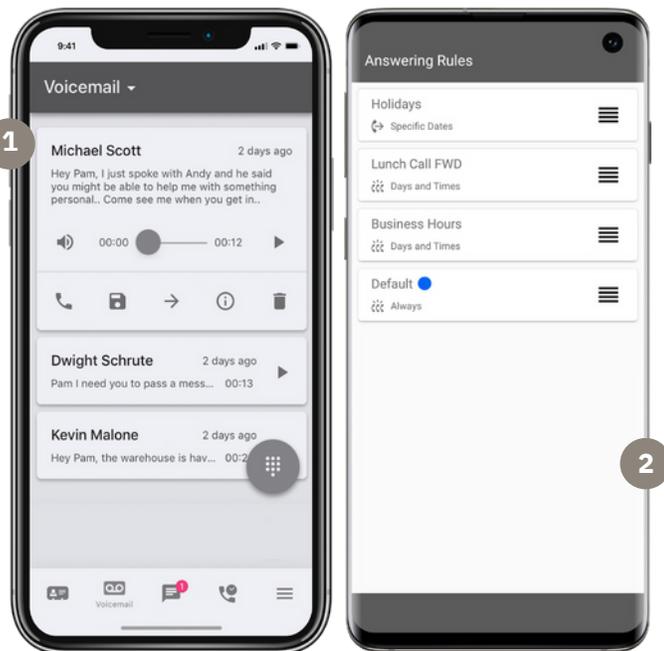
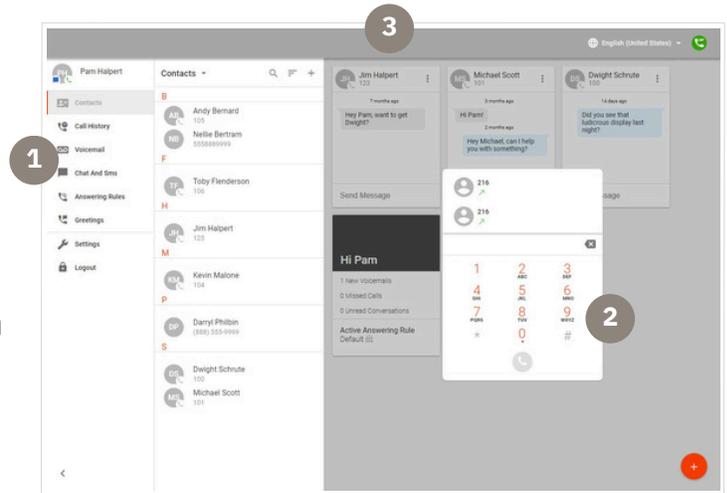


## User Portal

- 1 Manage Messages
- 2 Quick view of current Profile and Phones
- 3 Full Call History
- Manage Contacts
- Answering Rules
- Find-Me / Follow-Me
- Forwarding
- Personal Music on Hold

## Web Phone

- 1 Visual Voicemail
- 2 Dial Pad with Easy Access to Recent Calls
- 3 Multi-Chat Board for Quick Communication
- Manage Answering Rules and Greetings
- Presence and Chat Indicators



## Expanded Android/iOS Softphones

Keep your personal mobile number private by using your office number on your mobile phone.

- 1 Visual Voicemail
- 2 Change Answering Rules Remotely
- 3 Full Call History
- Presence Indicators for Co-workers
- Free WiFi Calling globally

## Exceptional Features

### Office Manager Web Portal

A dedicated portal that lets you control all functions and features of your phone system.

### User Web Portal

An easy to use web portal for each user to review call logs, listen to and manage voicemail and change personal settings.

### Call Conference (3 Way Calling)

Add another outgoing call to an already connected call.

### Call Forward

Selectable options on forward always, forward on busy, when unanswered or when offline. You can also redirect calls to your mobile phone/external phone number or a user inside your office.

### Call Hold

Easily puts a call on hold while you answer another call.

### Call Logs

Provides downloadable detailed call records by extension or by company.

### Call Screening

Callers are required to record their name, and you get an audible option to accept/decline.

### Call Transfer

Transfer calls to another user or outside phone number.

### Call Blocking

Block unwanted and/or anonymous callers.

### Caller ID and Name Display

Know who is calling before you answer with name and number display.

### Caller ID Block

Block your caller ID from being displayed on outbound calls.

### Click to Dial

Users can click to dial numbers and return calls in call history from their User Web Portal.

### Do Not Disturb

Callers go directly to voicemail when you don't want to be interrupted.

### Emergency Assistance (911)

Set an address for individual extensions (users) or for your entire company so that responders know where to send help in the event of an emergency.

### Find Me – Follow Me

Calls can be forwarded to multiple numbers that will ring all at the same time or in a sequence you define.

### Mobile Apps

Tablet, smartphone and computer apps are available to allow dialing to and from these mobile devices from a WiFi or cellular network.

### On Demand Call Recording

Records calls on your extension with simple keystrokes, record what you want, when you want.

### Company Call Recording

Automatically record some or all company phone calls and save them securely.

### Multiple Devices

You can register multiple devices for each extension. For example you could have your office phone, a softphone on your mobile device and another phone at your home and all could ring at the same time.

### Ten-digit Dialing

No need to dial 9 or even 1 to make a long distance call.

### Automated Attendant/ Virtual Receptionist

Streamline efficiency with an Automated Attendant to answer and direct all your inbound calls. You can optionally configure to have live answer before the Automated Attendant kicks in. Incoming callers select options from a menu to reach the appropriate department or individual.

- Different greetings for day or night
- Holiday schedule and greetings
- Dial by name directory
- Transfer to external numbers automatically

### Music and Messages on Hold

Upload your customized recordings. We can also record your message for you.

### Simultaneous Ring

Same as Find Me - Follow Me, allows you to program many numbers where you can be called in a cascading or simultaneous order.

### Time Frames

Easy drag and drop scheduler to set your office hours and call routing.

### Voicemail

Every user gets their own voicemail to securely check messages from the phone, or a website from anywhere in the world.

### Voicemail to Email

Receive voicemail as an audio file attached to email. Can be played back on your smart hone. Also see optional Voicemail Transcription.

### Hunt Groups

Calls can be forwarded to multiple users or telephone numbers that will ring all at the same time or in a sequence you define. For example, the sales or service team can be in a hunt group.

### Web Phone

Use an extension on the go using chrome with any computer and microphone. Compact and expanded views give users the choice to see active chats, answering rules, voicemail messages, and more.

### Mobile Softphone

Compatible with both Android and iOS the Mobile Softphone allows any user to use their cell phone like a desk phone. Dial contacts in your local phone book or company directory, record and change greetings, send and receive chat messages, and view your voicemail and transcription right from the app.

## Add-on Features

### Voicemail Transcription

Have your voicemail messages emailed to you as written transcripts, with audio files attached.

### Greeting Changes

Changes to your greetings are available. Fees apply to each order which could include single or multiple recording changes done at the same time. You can upload and record your own greetings at no charge anytime.

### Conference Calling

Full web control and recording for inbound calling. Also add outbound called participants from the portal.

### Toll Free Number

Add a new toll free number or let us move your existing toll free number. Toll Free numbers allow anyone in Canada and the US to reach you without the caller incurring any long distance charges.

### Local Numbers

Keep your existing number(s) or pick from over 1,600 Canadian cities or towns. Portray a local presence in any additional market by publishing a local phone number in any area code. International and US cities are also available.

- Local numbers for remote employees
- Great for geo-targeted marketing campaigns
- Same functionality as Main Company Phone Number

### Internet Fax

Easily send faxes via the web or email. Receive faxes via the Web or in your email as an easy-to-file-or- forward PDF document.

### Portal Fax

Use your phone portal account to send and receive personal faxes in PDF format. Faxes will be forwarded to your email for attention.