Clear Biz
www.clear-biz.com

A Management Software Solution For Accounting Professionals

• TAKE CONTROL OF YOUR PRACTICE •

Introduction to Clear Biz

Why Clear Biz Is The Right Solution For You.

Accounting Practitioners spend the majority of their practice chasing their clients for information and trying to manage the status of each of their deadlines each month which can lead to frustration at times.

Having worked with thousands of Accounting Practitioners for over 15 years, we understand exactly the frustration Accounting Practitioners go through on a daily basis and because of this we have provided a solution in **Clear Biz**.

Clear Biz is a software specifically designed for Accounting Practitioners that takes a very hard look at the real-world process of managing clients, notifying clients of their upcoming deadlines, getting the paperwork on time and managing the status of each of the clients' tasks.

Clear Biz's extended features gives you the ability to track and record any missing information, log in communications, appointment scheduling, time and billing and more!

The goal of Clear Biz **is to help save you time, money and run your practice more efficiently.** Clear Biz **gives you the peace of mind knowing that everything is in control.**

Go ahead and check out this brochure to see all the benefits Clear Biz has to offer and which edition of Clear Biz is right for you and your practice.

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President, Clear Biz

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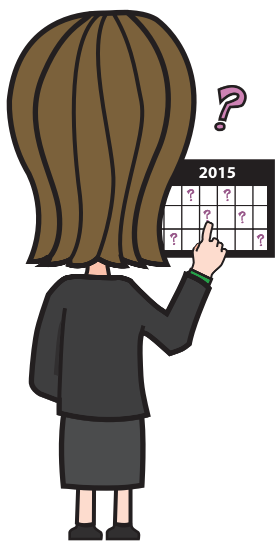
5 Key Issues Accounting Professionals Face On a Daily Basis

Here's an inside look at the daily life of an Accounting Professional and how Clear Biz can help solve these issues for you and your practice.

1



Determining Which Deadlines Are Due

The more clients you have, the more deadlines you have. It can be hard to stay on top of upcoming deadlines.

3

Managing Workload To Get Everything Done on Time

You need to prioritize which tasks need to be completed first, which staff members have time to work on them, and also not miss any deadlines.

2

Notifying Clients Of Their Upcoming Deadlines

Next, you need to notify your clients of their upcoming deadlines. It can be very time to manually phone or email every client.

4

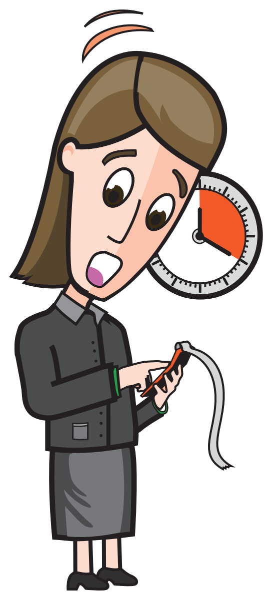
Tracking What Paperwork Clients Have Brought In

You need to keep track of what paperwork each client has brought in already and what is still missing; you need to contact the client to let them know what is missing; and you need to record when you receive the missing items.

5

Tracking Your Time And Full A/R

You need to know how much time was spent on each task for every client so you can bill them correctly. You also need to keep track of which invoices have been paid and which are outstanding for each client.



Clear Biz can save you time, money and run your practice more efficiently. How?

- Built-in federal and state due dates
- Generate and send auto-notifications to your clients of upcoming deadlines in seconds!
- View all of your tasks and deadlines at a glance.
- Record what paperwork clients have brought in and track missing information.
- Built-in timers make invoicing easy

And Much More!

LEARN MORE ▶

DID YOU KNOW?

Spending 10 minutes on each issue can cost you and your practice approximately $54,000 a year*. **Surprised?** Try your own numbers using our online calculator at **www.clear-biz.com/cost_calculator.html.**

*Figure based on 5 employees at a hourly rate of $50/hr working 260 business days/yr.

Importing Clients & Client Information

IMPORTING BUSINESS & PERSONAL TAX CLIENTS

IMPORT FROM

- ACT!
- Maximizer
- QuickBooks
- MS Excel
- MS Outlook
- Text or CSV File

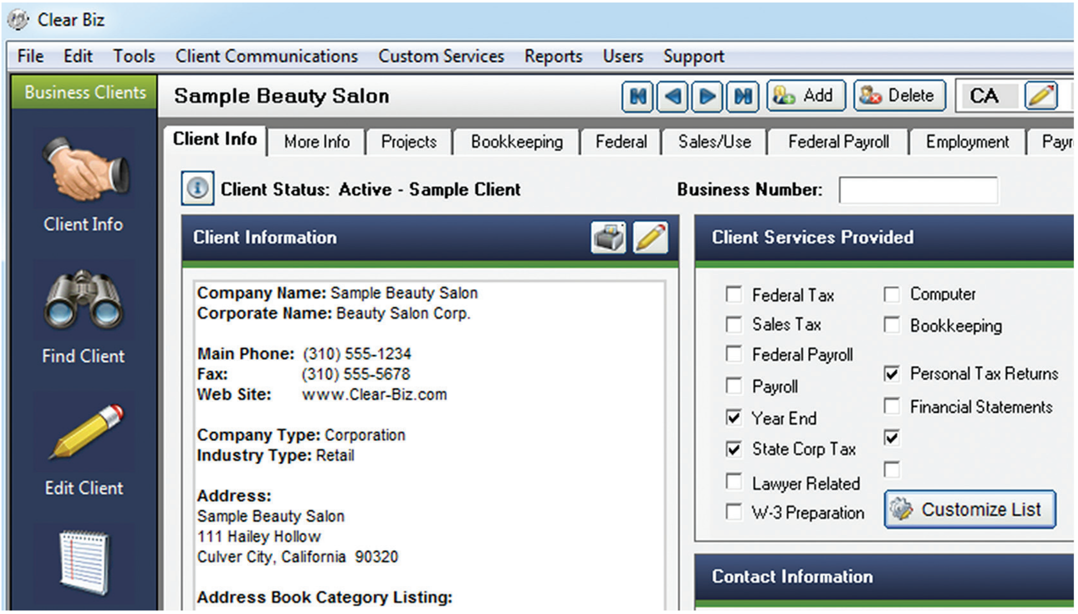
Invoicing and A/R to QuickBooks

Clear Biz allows you to transfer your invoice and A/R information into Quickbooks so you can avoid entering information twice.

Clear Biz truly brings extra value by becoming a bridge software solution which allows you to import and synchronize your clients' information across several different software packages.

Microsoft Outlook and your Smartphones

Clear Biz synchronizes with Microsoft Outlook and allows you to transfer your clients' information, tasks and appointments back and forth to Microsoft Outlook.



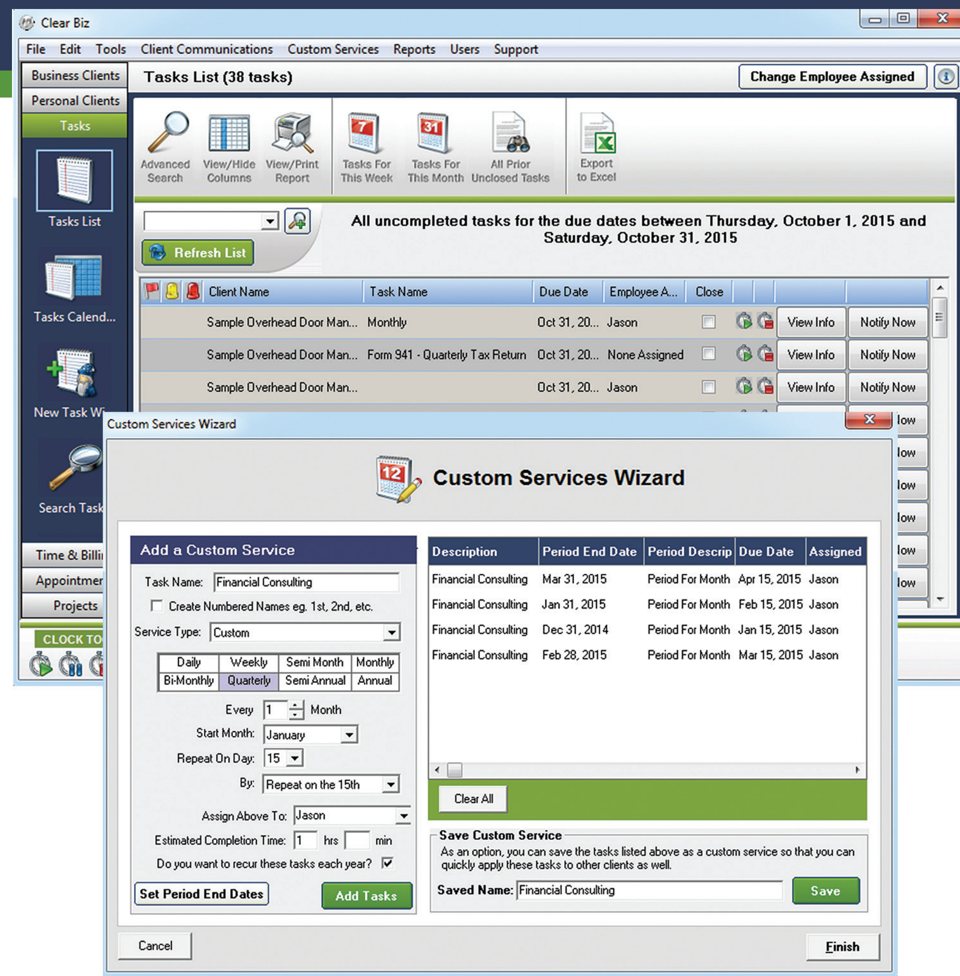
RECORD YOUR CLIENTS' INFORMATION

You can finally record all of your clients' accounting, business and personal information in one place. In addition to Clear Biz's 200+ information fields, you can also include any additional information about your clients with customized fields and notes sections.

QUICKLY SEARCH AND EDIT YOUR CLIENTS

Clear Biz allows you to **quickly search clients' information** based on any information you have entered into Clear Biz. In addition, you can also search based on partial matches.

Task Management



EASILY MANAGE YOUR TASKS

Assure your clients that they will never miss another deadline again. With Clear Biz's Tasks Management section, you can view and organize all of your tasks in one place.

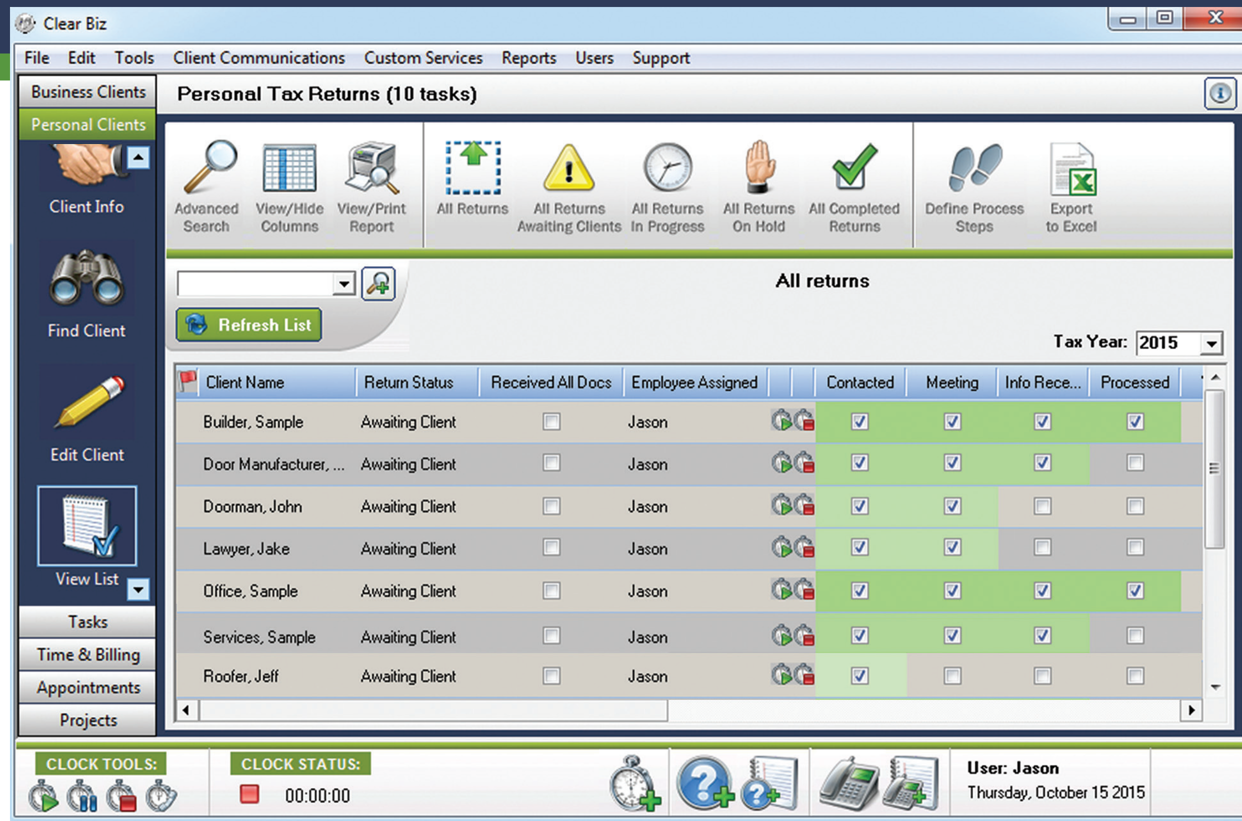
Clear Biz makes it easy to quickly setup and schedule your tasks because Clear Biz already knows all the Federal and State due dates. Clear Biz also allows you to setup your own one-time and recurring tasks for easy allocation to clients. In addition, you can save your own task schemes and apply them to as many of your clients as needed in the future.

FEATURES

- Built-in federal and state due dates.
- View your clients' tasks by day, week or month.
- View your and your staff's workload at a glance.
- Easily allocate clients' tasks to your employees and have them view it instantly.
- Flag priority items so everyone can view status of tasks at a glance.
- Setup and save one-time or recurring custom services for clients.

Our *Calendar View* allows you and your staff to view and organize workload at a glance. Whether you handle remittances on your clients' behalf or are simply notifying them of upcoming deadlines, Clear Biz's Tasks Management feature will become an invaluable asset in your office.

Personal Tax



MANAGE YOUR PERSONAL TAX CLIENTS

Clear Biz provides you with a complete list of all of your personal tax clients and shows you exactly who has brought in their information, what the status of each return is and who is working on it.

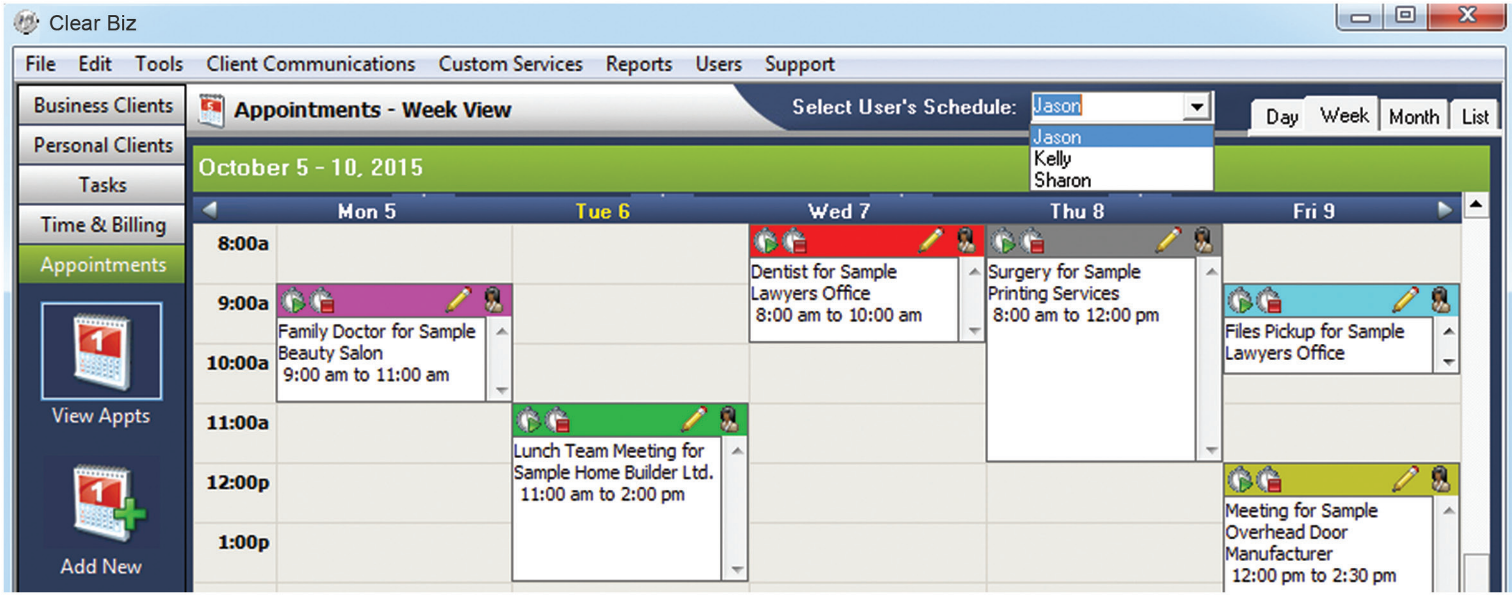
DEFINE PROCESS STEPS

The advantage of the personal tax section is that you can specify exactly how many steps it takes for your office to complete a tax return, in what order and define what they are.

FEATURES

- Define and specify number of steps it takes for your office to complete a tax return.
- Track exactly who is working on each step and what the status of each return is.
- The preparers can type questions they may have for clients and track and record any missing information they need.

Appointments Scheduler



ACCESS TO ALL OF YOUR EMPLOYEES' SCHEDULES

Clear Biz includes an easy-to-use appointment scheduler complete with multiple views that allows you to control your schedule. Clear Biz runs off a central database on your network so everyone can view and access each other's schedules with the click of a mouse.

The key to a well-run, organized office is to give each of your staff members the tools they need, so they know what they need to do and when they need to do it. Clear Biz provides them with a single, transparent system which updates information in real time.

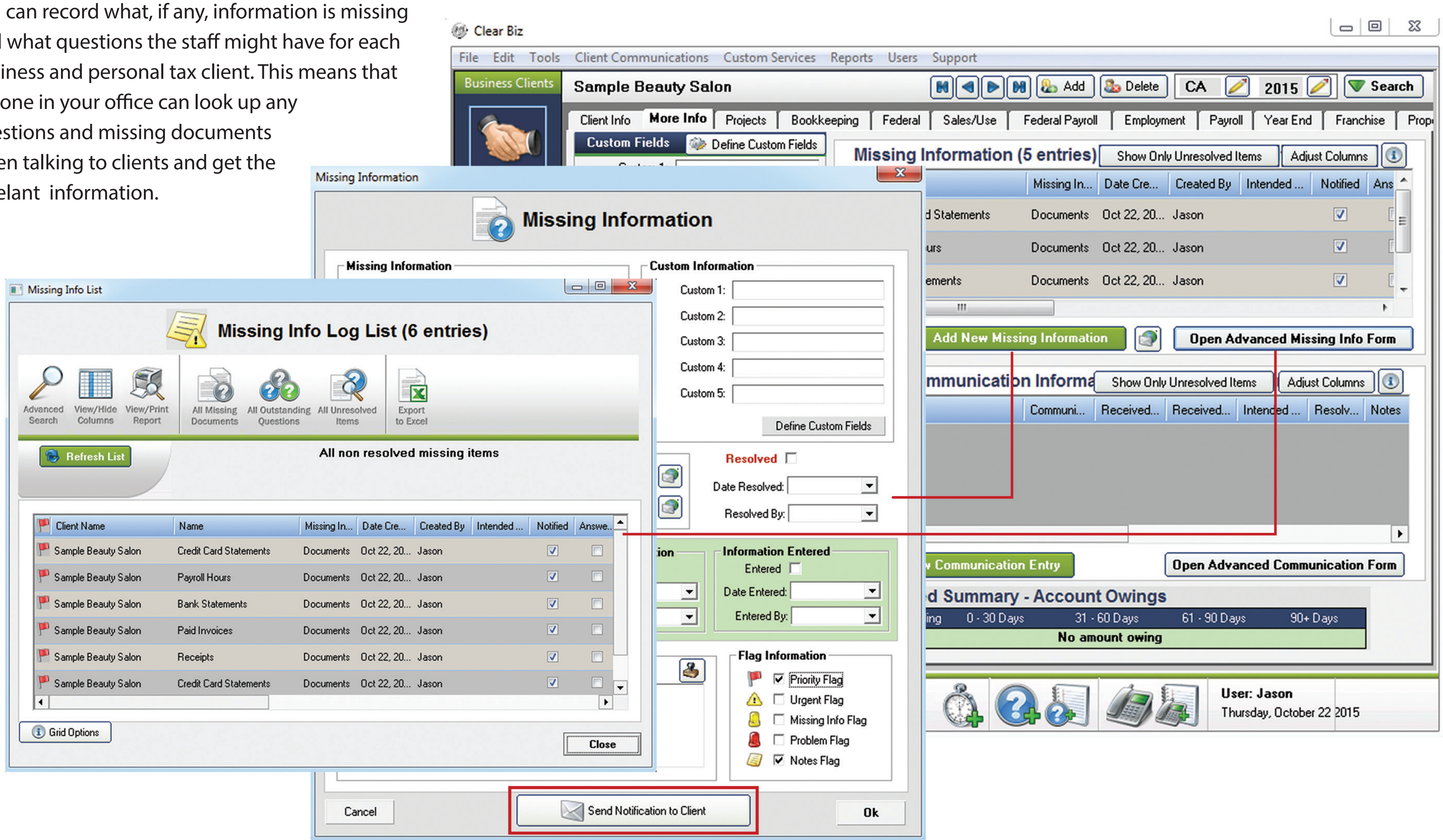
FEATURES

- View appointments by day, week, month or list view.
- Quickly search appointments that meet your criteria.
- Easily create repeating appointments and assign them to multiple employees at once.
- Automatically notify your clients of their upcoming appointments.
- Ability to overlap two or more employee's appointment schedules to quickly view common available times.

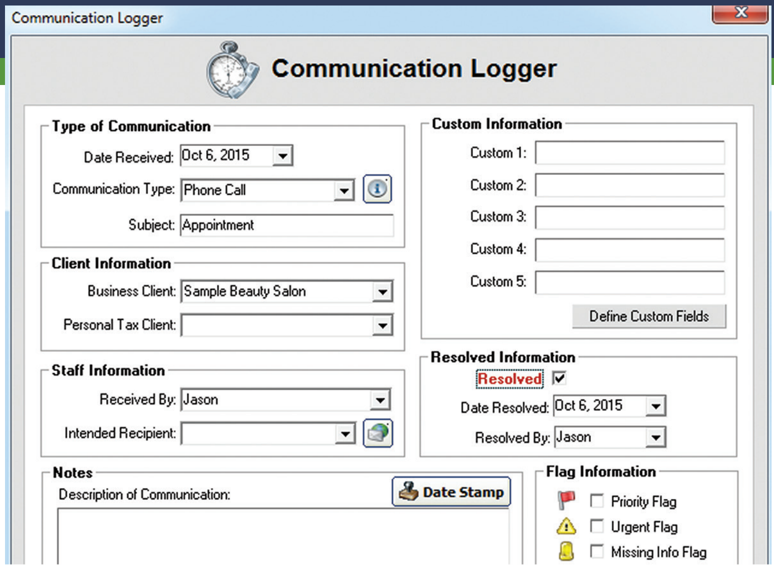
Missing Information

TRACK AND RECORD MISSING INFORMATION

You can record what, if any, information is missing and what questions the staff might have for each business and personal tax client. This means that anyone in your office can look up any questions and missing documents when talking to clients and get the revelant information.



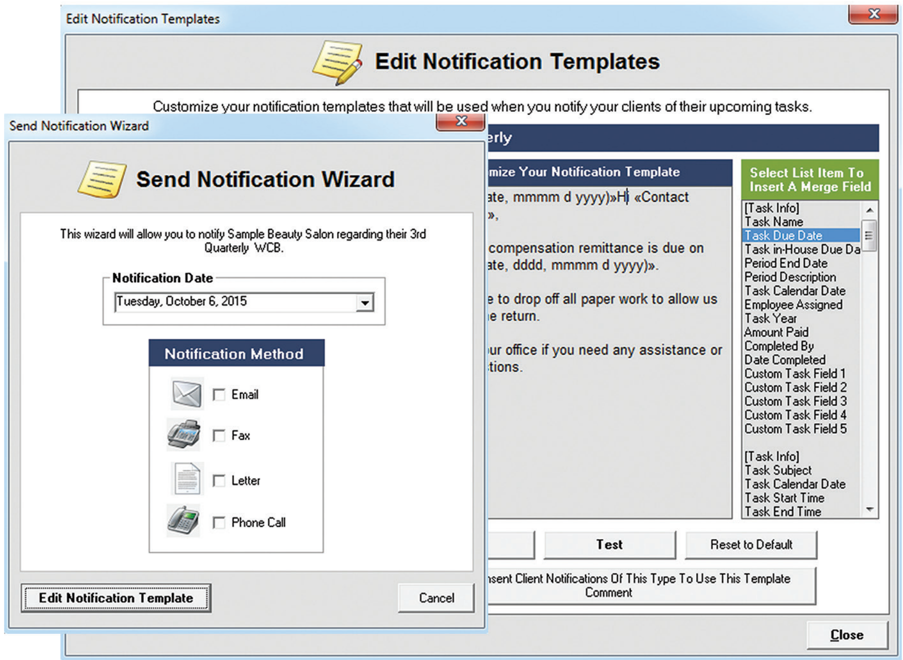
Client Communications



COMMUNICATION LOGGER

Clear Biz has a new communication logger which allows you and your staff to log all phone calls and client communications. You can assign tasks and duties to other staff based on the incoming communications.

Our communication list view allows you to easily review all calls that were directed to you so you can review all missed calls taken by other staff on your behalf. You can also review all communications for any client to gain a complete picture of all the conversations different people have had with any client.



AUTOMATIC NOTIFICATIONS

Clear Biz can deliver superior customer service and exceed your customer support performance goals by automatically notifying each of your clients of their upcoming deadlines. It only takes a couple of seconds and will save you hours. You'll wonder how you ever worked without it.

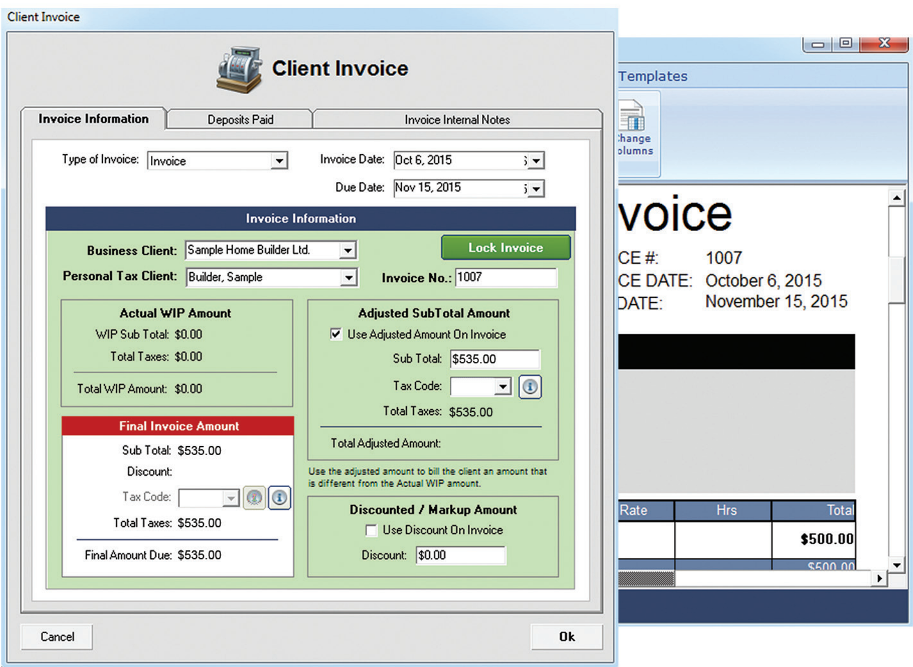
FEATURES

- Send notification to clients by email, phone, fax or letter.
- Ability to customize notification template comments for each task type for all clients.
- Default email program will open when notification is sent by email.

Time & Billing

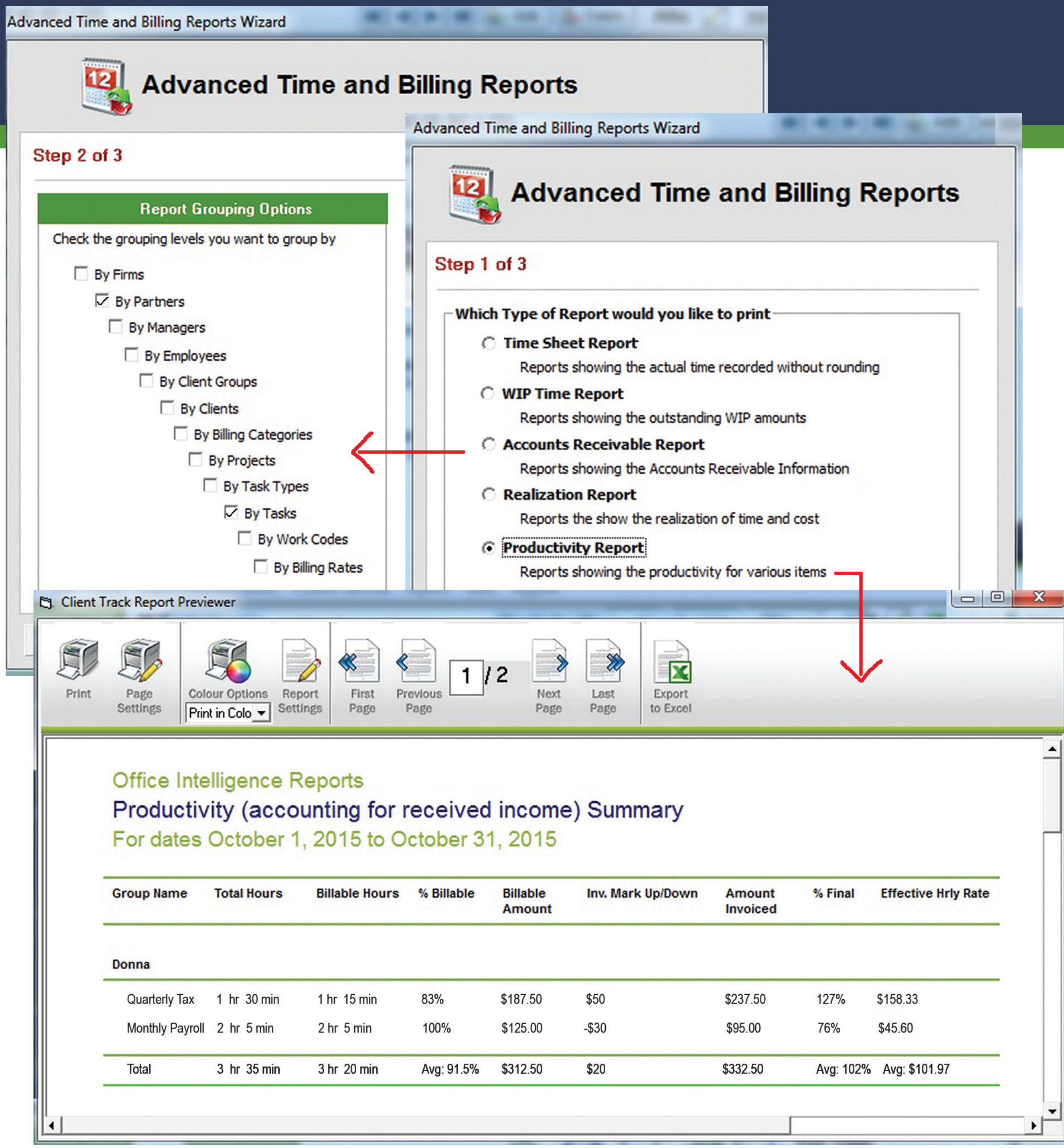
TIME & BILLING AND FULL A/R SYSTEM

Clear Biz has a full time tracking and A/R system where you can track your account balances and productivity levels for your clients, staff and projects. Clear Biz is designed to handle a range of invoicing options for small- and medium-sized practices where you can either bill flat rate invoices, simplified invoices with custom itemized services, or more detailed WIP billing. We have worked hard to provide a system that gives you the flexibility to track your time and invoice your clients just the way you want.



FEATURES

- Setup your billing by hour, job or flat rate.
- Specify your billing type and rate for each employee's task type.
- Built-in timers that provide accurate recording on time spent on tasks.
- Manually enter time using entry forms or through the task calendar.
- Track all of your staff's time and WIP. generate staff Time Sheets.
- Ability to show your clients only what you want them to see on the invoice including adjustments, discounts, simplified descriptions and more.
- Enter all your deposits for a full Accounts Receivable system where you can quickly view your outstanding balances.
- Wide range of Time & Billing reports.



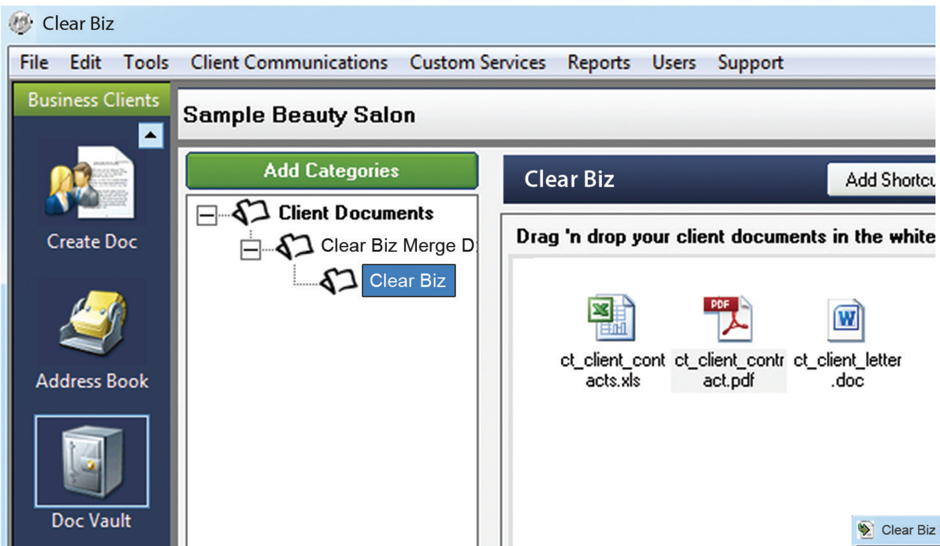
ADVANCED REPORTS

Our advanced reporting allows you to break down and group any of our reports (time sheet, WIP, productivity, realization) for any date range and by any grouping combination (shown in Step 2).

LIST OF REPORTS

- Client Statement of Accounts
- Time Sheet Reports (Actual time spent)
- Accounts Receivable Aged Summary
- Accounts Receivable Outstanding A/R Summary
- WIP Totals Summary for all Clients
- WIP Aged Totals Summary for all Clients
- WIP Detail for any Client
- Productivity Reports
- Revenue Realization Reports
- Revenue Recovery Reports

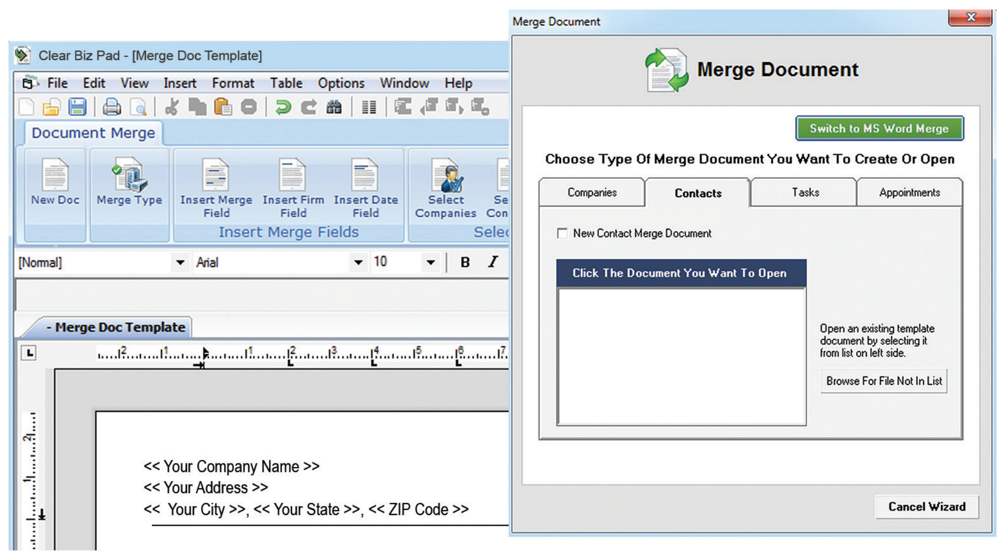
Document Vault & Merge



ORGANIZE YOUR CLIENTS' FILES

Our Document Vault is a great feature which gives you the ability to organize and manage all of your clients' files in one place.

Each client has its own document vault where you can drag and drop all of your clients' files and documents into it. Clear Biz records the shortcut of the actual files and displays an icon in the document vault. You can organize your clients' files into categories so that all the information is at your fingertips regardless of where your files are saved on your computer or network.



BRAND NEW DOCUMENT MERGE INTERFACE

Clear Biz includes a powerful document editor program with a new interface that allows you to merge any of your clients' information directly into document templates. Select multiple clients at once and create personalized merge documents which can be saved as Microsoft Word or PDF formats.

Comparison Chart & Pricing

Clear Biz Features	BASIC EDITION	WORKFLOW PRO EDITION
Import Business & Personal Clients	✓	✓
Synchronize with MS Outlook	✓	✓
Client Information (Search & Edit)	✓	✓
Tasks Management	✓	✓
Client Auto-Notifications	✓	✓
Track & Record Missing Information	✓	✓
Communication Logger	✓	✓
Address Book	✓	✓
Document Vault	✓	✓
Label Merge	✓	✓
Default Reports		✓
Additional Reports (Time, WIP, A/R, Productivity & Realization)		✓
Time Recording & Entry		✓
Complete A/R & Client Deposit		✓
Create & Customize Invoices		✓
Create & Manage Projects		✓

MONTHLY PRICING

When you buy Clear Biz for the first time, you are paying for **one license per active user** on a monthly basis.

Starting as low as*

$14.95 / monthly per user

FOR FULL PRICING

Visit us at:
www.Clear-Biz.com

* Price is based on a single license of the Basic Edition on a monthly basis as long as you use Clear Biz.

Our goal with Clear Biz is to help you save time, money and run your practice more efficiently.

Try our 30-day free trial to explore all our features and discover for yourself how Clear Biz can help you take control of your practice.

30 DAY FREE TRIAL

www.Clear-Biz.com

MONTHLY PRICING

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*Prices are subject to change without notice.

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For more information, visit our website at **www.Clear-Biz.com.**