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**Manage your documents
and collaborate more efficiently**

Propheo gets accountants organized

Do you want to consolidate and organize your clients' files?

1 - How does Propheo help you collect your clients' files?

Each customer must collect at end of year all documents necessary for tax reporting.
This is always a tedious and error-prone task for both client and yourself. You will spend hours checking if their files are complete.

- With Propheo, you can create a personal space for each of your customers. Your client can access the Internet without any installation. The customer can then can store documents in a directory structure that you deter mine. You can manage and access all your clients records.

2 - How can Propheo ease your inbox management?

Nowadays, communication with a customer is mainly done by email exchange. Customers will send you all the documents for their filing by email. But soon, you're lost in all these e-mails and you have a hard time finding the correct version of your client's document.

- Propheo helps you overcome the headache of dealing with many versions of a document. When a customer sends you an email with his documents, they will be automatically filed in the designated folder you have created. Documents are properly saved for optimal retrieval.

3 - How does Propheo improve the communication with clients ?

You are usually very busy during tax season and your clients might find it difficult to make an appointment. During this period, you spend a lot of time either by phone or by email or by meeting directly with your customer.

- Propheo reduce your workload during this peak period. Customers are able to send you tax documents throughout the year so you will easily control clients' files. You can also enter the date of then end of your client's fiscal year and set a task reminder. of of your clients and so set a callback to perform actions.
  Alerts sent via email can be implemented by a simple click and you will be warned in real time when a client de posits a file in his directory.

4 - How does Propheo secure your data ?

You usually have clients all documents on your computer or on the internal network in your office or in your email tool. If the computer or email management fails, you risk losing customers and possibly tarnish your reputation.

Everyday Propheo backs up all your documents and those of your clients.
Furthermore, each change made to a document is preserved. You can always recover a previous version of your data.

Advantages:
* Documents are organized per client.
* A record is kept of all the changes in a document.
* Email management is simplified.
* Data is secure and accessible from anywhere.

Improved document control and management all year long