CPA

Practice **Advisor**

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several enhancements to its Client Centric Communications. Subscribers can now set up recurring messages such as birthday or anniversary cards and tax reminders.

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Tenenz, Inc., which offers accounting firm websites, tax tools and forms, has made several enhancements to its Client Centric Communications. Subscribers can now set up recurring messages such as birthday or anniversary cards and tax reminders.

Additionally, Tenenz has added a self-signup form accounting professionals can

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freeing up staff and accountants' time for more value-add work."

Date-driven messages feature:

- more branded message templates to choose from
- the option to add personalized greeting (client's first and/or last name) to each message
- full reporting and tracking including the ability to view the complete list of messages sent
- the automatic delivery of a mobile-friendly Web version of the message
- the ability to view or edit the message at any time

Birthday and anniversary cards: Tenenz' Client Centric Communication service will automatically send cards to any clients whose listed birthday or anniversary matches the current date. The subscriber can choose the message style, add branding and personalization, and set the time of day the messages will send. Messages are built and scheduled overnight and the subscriber receives a notification each time a message has been scheduled.

Tax/Appointment Reminders: Tenenz' Client Centric Communication service will automatically send reminders to any clients who have a date in their appointment or custom date fields in the client lists. When building a date-driven tax reminder, subscribers can choose the message style, add branding and personalization, and set the time of day the messages will send. Additionally, subscribers can select which list column date to use (appointment or custom date), and set an offset date. For example, if the dates in a subscriber list are for each client's appointment date, subscribers can set the reminder to send up to 30 days before the listed date. Reminders also include the option to dynamically add the appointment date and time to the message so the client knows when their appointment will be.

Self-Signup Form

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- page or redirection to the accounting firm's website
- protection of client data due to the use of an SSL encrypted connection
- weekly email notification that includes a count of the addresses added each week
- easy access to full details for client sign-ups in Tenenz' Client Centric
 Communications Digital Service Center
- the form and all reports are compliant with the new Canadian Anti-Spam Laws, which require expressed consent for recipients of mass emails

Client Centric Communication's online tools automate important client messaging which greatly assists today's multi-tasking professional accountant by delivering consistent client contact further reinforcing client relationships.

Firm Management • Technology

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