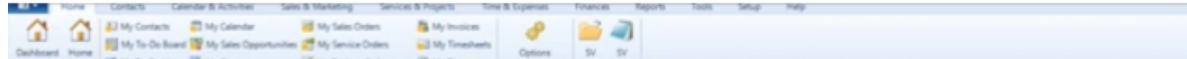


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Results



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ResultsCRM

Abacus Next

www.abacusnext.com/software/CRM/results

From the [2020 reviews of CRM systems](#) for accounting firms.

Designed for small businesses and accounting firms that use QuickBooks Desktop or QuickBooks Online applications, ResultsCRM offers complete bi-directional CRM capability between the application and QuickBooks Online, QuickBooks Desktop, and Microsoft Outlook, eliminating the need to enter data twice.

ResultsCRM is an on-premise application that includes a mobile app. Firms can also choose to have the application hosted in the cloud. The ResultsCRM system also offers a mobile app that can be used with iOS and Android devices for easy access to data at any time.

ResultsCRM is designed to be an all-in-one solution for small businesses offering a variety of features such as project and workflow management, billing management, service scheduling, sales management, and complete contact management. With its Microsoft Outlook integration, ResultsCRM users are able to add contacts, activities, and email conversations using the ResultsCRM QuickAdd button housed in Outlook.

ResultsCRM offers solid contact management capability, with users able to add, edit, and manage information on all clients from a single location. This ensures that all information is easily accessible for all necessary team members, including the ability to access a complete history of activity for any contact or client, such as email correspondence, client activities, and a log of any other client correspondence. And with bi-directional capability with both QuickBooks applications and Outlook, any

updates, edits, or additions completed in one application will automatically appear

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onsite services to their clients. Using the service scheduling feature, users can view employee schedules, schedule available employees for upcoming assignments, and view the shared group calendar which allows managers to easily view upcoming tasks and assignments for each team member. In addition, the ResultsCRM calendar also includes drag-and-drop capability for adding a task to a team member's calendar.

Results CRM is designed for small businesses and accounting firms that are using or plan to use QuickBooks applications and is not suitable for larger firms or enterprise level businesses. Integration capabilities in ResultsCRM are good, with the application offering integration with QuickBooks Desktop, QuickBooks Online, Constant Contact, Microsoft Office 365, SharePoint, Microsoft Outlook, and TSheets. In addition, integration with applications such as SmartVault allows users to easily manage all documents between applications, including the option to attach contracts, invoices, diagrams, and other documents in SmartVault, while connecting those documents with ResultsCRM; integration with ShareFile allows users to sync documents between ResultsCRM and ShareFile, with the ability to view the files from any device, including smartphones and tablets.

Results CRM offers a good selection of Contacts reports, including a To-Date History report, Invoices Detail report, Payments by Customer report, and Expenses by Customer report. Users have the option to customize Results CRM reports by adding a variety of filters, with the option to preview the report and make any changes prior to running it. Reports can also be exported to a CSV file or to Excel as desired or saved in ResultsCRM as a PDF.

Data can be imported and exported in ResultsCRM from both CSV files and Excel files, with users able to match specific fields for accurate importing. In addition, users that are synching their data with QuickBooks applications will need to import all of their QuickBooks files prior to importing any other type of file.

ResultsCRM includes an account portal for all application users where a variety of

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2020 Rating – 4.5 Stars

Strengths:

- Great for QuickBooks users
- Offers both on-premise and cloud deployment
- Good reporting options

Potential Weaknesses:

- Only suitable for QuickBooks users
- Not suitable for larger businesses

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