

accounting360

Built on the industry-leading Microsoft Dynamics 365 platform, accounting360 is a comprehensive practice management suite built to meet the unique needs of accounting firms. With industry-specific solutions that span the entire organization, accounting360 can help your firm identify and capture more work, efficiently deliver and account for your engagements, and hire and retain the best possible talent.

What is accounting360?

accounting360 is a complete marketing, business development, practice management, accounting, and human resource management solution purpose-built for accounting firms.

MARKETING



- Marketing Lists
- Campaigns
- Events
- Content
- Surveys
- E-mail Marketing
- Marketing Analytics

BUSINESS DEVELOPMENT



- Clients & Contacts
- Relationship Intelligence
- BD Plans
- Cross-practice Selling
- Leads & Opportunities
- Project History
- Employee Experience
- Document Assembly
- Customer Analytics

PROJECT MANAGEMENT



- Engagements
- Planning
- Budgets
- Resourcing
- Collaboration
- Time & Billing
- Expense Management
- Practice Analytics

ACCOUNTING



- Financial Management
- Project Accounting
- Revenue Recognition
- AR, Credit & Collections
- Accounts Payable
- Fixed Assets
- Budgeting
- Tax
- Financial Analytics

HUMAN RESOURCES



- Recruiting
- Onboarding
- Administrative HR
- Performance
- Training
- Leave & Absence
- Compensation
- Benefits
- People Analytics

Why accounting360?

This unique solution, purpose-built for the accounting industry, integrates all of your firm's business areas to provide a true 360-degree view of your business. Any time, from any location, on any device.

- ✓ Leverage your relationships to identify and capture more new work with a modern CRM and relationship intelligence platform.
- ✓ Successfully manage client engagements with a strong project management tool set.
- ✓ Confidently manage your firm's finances with a world-class financial management solution.
- ✓ Find, deploy, and retain the best possible talent with a powerful human resource management platform.

What makes accounting360 unique?

No longer do accounting firms have to choose between limited practice management solutions and generic applications that don't address their needs. With accounting360, you get the best of both worlds – a comprehensive, industry-specific business suite AND a best-in-class cloud platform built to leverage the Microsoft tools your employees use every day.

Microsoft
Partner

2019 Partner of the Year Winner
Dynamics 365 for Sales Award
2019 Partner of the Year Finalist
Dynamics 365 for Talent Award
Media & Communications Award



ProServ