Tax & CPA Practice Management CRM

Admyon Systems

Building Smarter Business Solutions

Project Overview

The Tax & CPA Practice Management CRM is a specialized client relationship and document management platform built for independent tax professionals and accounting firms. It centralizes taxpayer data, multi-year filing statuses, dependent records, and digital documents into a secure environment, while also providing tools to manage staff and marketing campaigns.

Business Problem

Tax preparation firms deal with highly sensitive client data, strict filing deadlines, and multi-year financial records. Using generic CRMs or basic spreadsheets results in misplaced tax documents, missed filing years, and disorganized communication regarding dependents and spouses. Furthermore, tax firms struggle to track which marketing channels or promotions (e.g., Refund Advances) are successfully bringing in new clients.

Our Solution

Admyon Systems developed a custom practice management system tailored to the specific data structure of US tax filings. The CRM allows accountants to log comprehensive taxpayer profiles—including spouses, up to four dependents, and multi-year filing histories (e.g., 2016 through 2027). By integrating a dedicated document repository and a social media campaign tracker, the application ensures that tax professionals stay organized, compliant, and growth-oriented.

Key Features

- Comprehensive Taxpayer CRM (Spouse, Dependents, SSN Tracking)
- Multi-Year Tax Filing Management
- Integrated Client Document Repository (Word/PDF tracking)
- Staff & Employee Management (Job Codes, Pay Cycles)
- Social Media & Promotional Campaign Tracking
- Advanced Client Search with Geographical Filtering

Technologies Used

Technology	Used
Microsoft Access	✅
VBA (Visual Basic for Applications)	✅
SQL	✅

System Modules

- Management Dashboard
- Client Entry & Taxpayer Profiles
- Client Documents Storage
- Employee Management
- Social Media & Marketing Tracker
- Client Search & Filtering

Screenshots

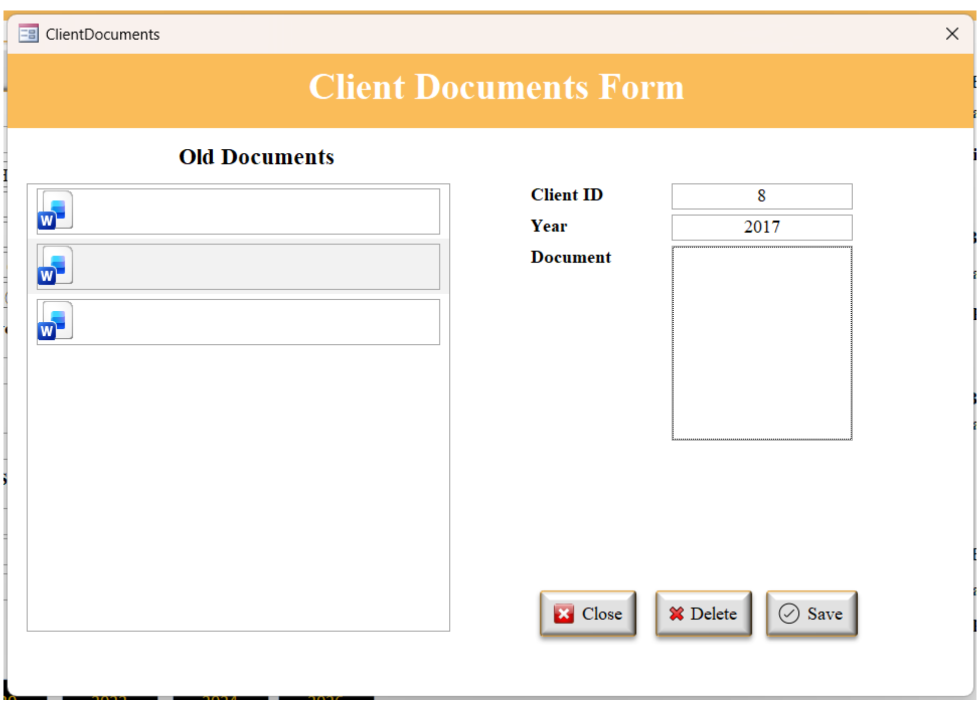
Practice Management Dashboard

A welcoming, clutter-free central hub that provides an immediate count of total active clients and quick navigation to essential modules like Client Entry and Social Media.

Taxpayer Profile Entry

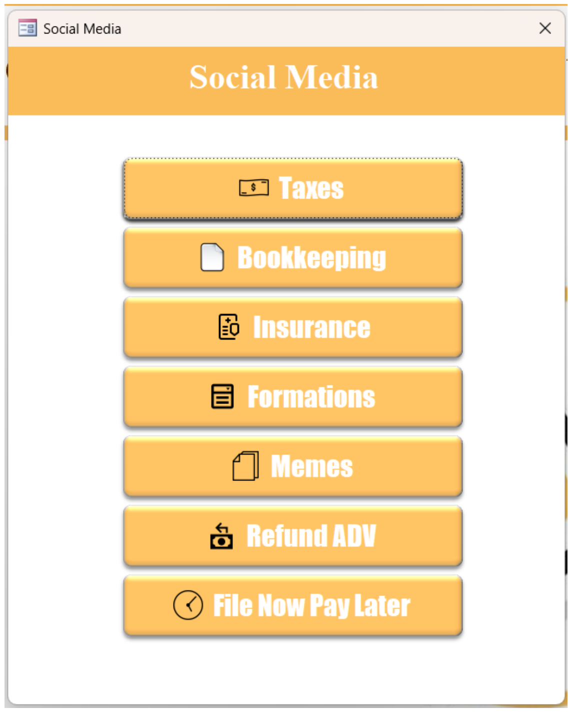
A highly detailed CRM form capturing critical tax data, including taxpayer/spouse details, multiple dependents, specific service types, and a grid to track filings across multiple tax years.

Client Search & Directory



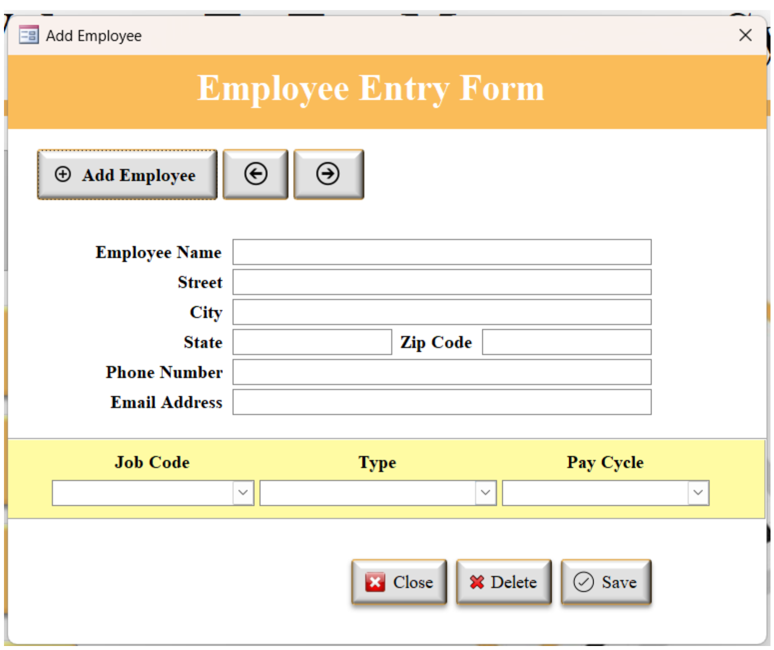
A robust directory allowing staff to filter and locate clients across various states and zip codes, complete with contact permissions and email addresses.

Client Document Repository



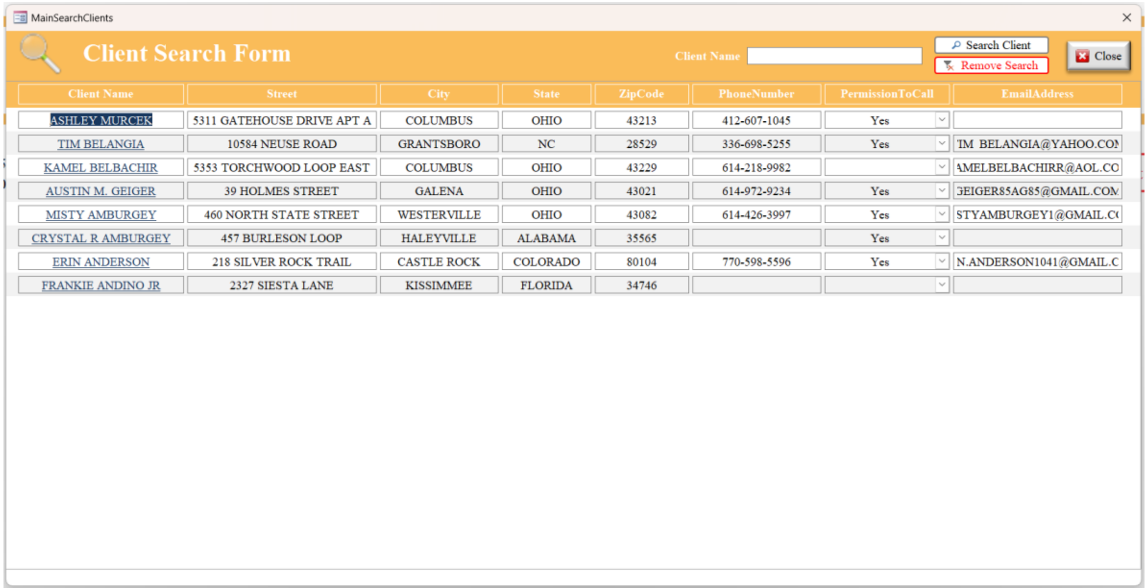
A secure archival screen where old tax documents, attachments, and sensitive client files can be linked directly to their respective client IDs and specific tax years.

Employee Management Form



An administrative tool to onboard firm staff, capturing essential HR data such as job codes, employment types, and customized pay cycles.

Marketing & Campaign Tracker


MainSearchClients

Client Search Form

Client Name | Search Client | Remove Search | Close

Client Name	Street	City	State	ZipCode	PhoneNumber	PermissionToCall	EmailAddress
ASHLEY MURCEK	5311 GATEHOUSE DRIVE APT A	COLUMBUS	OHIO	43213	412-607-1045	Yes	
TIM BELANGIA	10584 NEUSE ROAD	GRANTSBORO	NC	28529	336-698-5255	Yes	TM BELANGIA@YAHOO.CON
KAMEL BELBACHIR	5353 TORCHWOOD LOOP EAST	COLUMBUS	OHIO	43229	614-218-9982		AMELBELBACHIRR@AOL.CO
AUSTIN M. GEIGER	39 HOLMES STREET	GALENA	OHIO	43021	614-972-9234	Yes	GEIGER85AG85@GMAIL.COM
MISTY AMBURGEY	460 NORTH STATE STREET	WESTERVILLE	OHIO	43082	614-426-3997	Yes	STYAMBURGEY1@GMAIL.C
CRYSTAL R AMBURGEY	457 BURLESON LOOP	HALEYVILLE	ALABAMA	35565		Yes	
ERIN ANDERSON	218 SILVER ROCK TRAIL	CASTLE ROCK	COLORADO	80104	770-598-5596	Yes	N.ANDERSON1041@GMAIL.C
FRANKIE ANDINO JR	2327 SIESTA LANE	KISSIMMEE	FLORIDA	34746			

An innovative module for tax firms to manage internal marketing efforts, categorizing campaigns by services such as Bookkeeping, Insurance, Formations, and Refund Advances.

Business Benefits

✓ Streamlined tax season operations by centralizing all dependent and spouse data

✓ Prevented lost paperwork through an integrated digital document repository

✓ Enhanced client retention by accurately tracking multi-year filing histories

✓ Improved marketing ROI by tracking the effectiveness of specific social media promotions

✓ Secured sensitive taxpayer information within a dedicated, offline database environment

Project Highlights

- Tax-Specific Data Architecture
- Multi-Year Tracking Logic
- Marketing & Promotions Module
- Document Linking Capabilities
- Rapid Search & Filtering

Future Enhancements

Future versions of this system may include:

- Secure cloud backup for encrypted client tax documents
- Automated email integrations to request missing W-2s or 1099s from clients
- E-signature capabilities for remote document approvals
- Integration with tax preparation software (e.g., Drake, TurboTax) for data export

Project Summary

The Tax & CPA Practice Management CRM demonstrates Admyon Systems' deep understanding of the financial services sector. By tailoring a CRM specifically to the complex, multi-year data requirements of tax professionals, the application transforms a chaotic tax season into a highly organized, efficient, and scalable business operation.