

EspoCRM For Accountants

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Building strong, trusted relationships with clients is at the core of a successful accounting practice and is essential for long-term retention and growth. In an increasingly demanding regulatory and commercial environment, managing client enquiries, ongoing engagements, deadlines, and communications across multiple services can quickly become complex and time-consuming. Without a central system, key information can be fragmented, deadlines missed, and client service can suffer.

EspoCRM supports accounting firms by bringing all client, engagement, and communication data into one secure, central platform. Teams can store and manage client records, track interactions, and maintain full visibility of work from initial enquiry through to service delivery and ongoing support. Automated reminders, task management, and structured workflows help ensure deadlines are met, responsibilities are clear, and nothing is overlooked.

By providing clear visibility and collaborative tools, EspoCRM enables accounting teams to work more efficiently, improve internal coordination, and deliver a more consistent client experience. Real-time reporting and dashboards support better workload planning, compliance oversight, and informed decision-making, helping firms strengthen client relationships, maintain control, and grow with confidence.

EspoCRM Dashboards

EspoCRM

Powered by enable services

Home

Calendar

CRM

Enquires

Contacts

Accounts

Meetings

Jobs

Opportunities

Sales

Quotes

Invoices

Sales Orders

Products

Activities

Emails

Tasks

Enquires

All

+ Create Enquiry

212

New

Assigned

In Process

Recycled

Dead

Joe Bushnell
enable.services

Jeff Bezos
Amazon
jb@amazon.com

James Blease
enable
jbleese@enable.services
Nord Herida

Carol George
Calm Sailing Inc
carol.george@yahoo.co.uk
Sally Thomas

Julia Watkins
Complete Holding
julia.watkins@gmx.co.uk
680f8686e4e00899c

Theresa Daniels
Smallville Resources Inc
theresa.daniels@gmx.co.uk
Joseph Bushnell

Katherine Austin
AD Importing Company Inc

Gloria Reyes
QR&E Corp
gloria.reyes@aol.co.uk
Sally Thomas

Amanda Stephens
T-Cat Media Group Inc
amanda.stephens@yahoo.co.uk
Sally Thomas

Jacqueline George
Smith & Sons
jacqueline.george@yahoo.co.uk
Sally Thomas

Ann Banks
Draft Diversified Energy Inc
ann.banks@web.co.uk
Sally Thomas

Frances Hart
Pullman Cart Company

Irene Vasquez
360 Vacations
irene.vasquez@web.co.uk
Sally Thomas

Ann Gutierrez
247 Couriers
ann.gutierrez@aol.co.uk
Sally Thomas

Beverly Daniels
Dirt Mining Ltd
beverly.daniels@web.co.uk
Sally Thomas

Virginia Vasquez
X-Sell Holdings

Linda Carroll
Avery Software Co
linda.carroll@hotmail.co.uk
680f8686e4e00899c

Annie Shaw
Riviera Hotels
annie.shaw@outlook.co.uk
680f8686e4e00899c

Amy Wagner
Grow-Fast Inc
amy.wagner@yahoo.co.uk
680f8686e4e00899c

Evelyn Carr
Pullman Cart Company
evelyn.carr@outlook.co.uk
680f8686e4e00899c

Bonnie Sims
JBC Banking Inc

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Products

Activities

Emails

Tasks

Accounts

All

+ Create Account

1-50 / 128

Name	Website	Type	City	Assigned U...
sportsafe		Prospect		
Toysrus		Prospect		
Draft Diversif...	www.draftdiversified...	Prospect	Birmingham	Sally Th...
enable		Prospect		
Tesla		Prospect		Joseph ...
enable		Customer		
Hepco Motion	www.hepcotioninc.c...	Prospect		
BBC	bbc.co.uk	Prospect		
EnableIT Tec...	enable.services	Prospect		
Sea Region Inc	www.searegioninc.c...	Prospect	Leeds	Sally Th...
Riviera Hotels	www.rivierahotels.co...	Prospect	Leeds	Sally Th...
Rubble Group...	www.rubblegroupinc...	Prospect	Birmingham	Sally Th...
Q3 ARVRO III ...	www.q3arvroiii.co...	Prospect	Birmingham	Joseph ...

Map

Satellite

United Kingdom

Isle of Man

Blackpool

Liverpool

Stoke-on-Trent

Wolverhampton

Birmingham

Leeds

Sheffield

Nottingham

Derby

Manchester

Tracker Com LP Inc

QR&E Corp

Super Star Holdings Inc

Southern Realty It Corp

Underwater Mining Inc

T-Squared Techs

London

Wales

England

Google

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Products

Activities

Emails

Tasks

Sales Analytics

My Activity

...

Opportunities by lead source and user

Count 830

Amount Weighted £7.69M

James Blease

Joseph Bushnell

Nord Herida

Philippa

Sally Thomas

-Empty-

Call

Email

Campaign

Existing Customer

Partner

Other

Opportunity By Stage

Amount £178k

Count 9

James

admin

Prospecting

Qualification

Proposal/Price Quote

Closed Won

-Empty-

Perception Analysis

Negotiation/Review

Closed Lost

Calls by account and user

0

Sales by Month

£100k

Opportunities by user

James Blease

Joseph Bushnell

Nord Herida

Philippa Meadows

Sally Thomas

-Empty-

EspoCRM

Powered by enable services

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Calendar

CRM

Enquires

Contacts

Accounts

Meetings

Jobs

Opportunities

Sales

Quotes

Invoices

Sales Orders

Products

Activities

Emails

Tasks

Marketing

Admin

Reports

Import

Projects > Important Project

Star

Followed

2

Detail

Plan

Board

Gantt

+ Create Task

This Week

1

Name

Stage

Assignee

Timeline

Priority

Dependent On

Planning Marketing

To Do

28 Jul, 2025 -> 01 Aug, 2025

Normal

Next Week

1

Name

Stage

Assignee

Timeline

Priority

Dependent On

Roll out to testing users

To Do

04 Aug, 2025 -> 05 Sep, 2...

Normal

Planning Marketing

enable.services Overview

Real people, **real solutions**, real results

LOCATION. Ipswich, United Kingdom

EST. 1994 Family Run

TEAM SIZE. 48 employees

CSAT SCORE.  Based on past 3 yrs.



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OUR SOLUTIONS AND CORE PARTNERSHIPS

CUSTOMER RELATIONSHIP MANAGEMENT
CASE & ISSUE MANAGEMENT
TASK & PROJECT MANAGEMENT
MARKETING AUTOMATION



IT AND NETWORK
SUPPORT SERVICES



Since
1994

AUTOMATION PLATFORMS



Since
2017

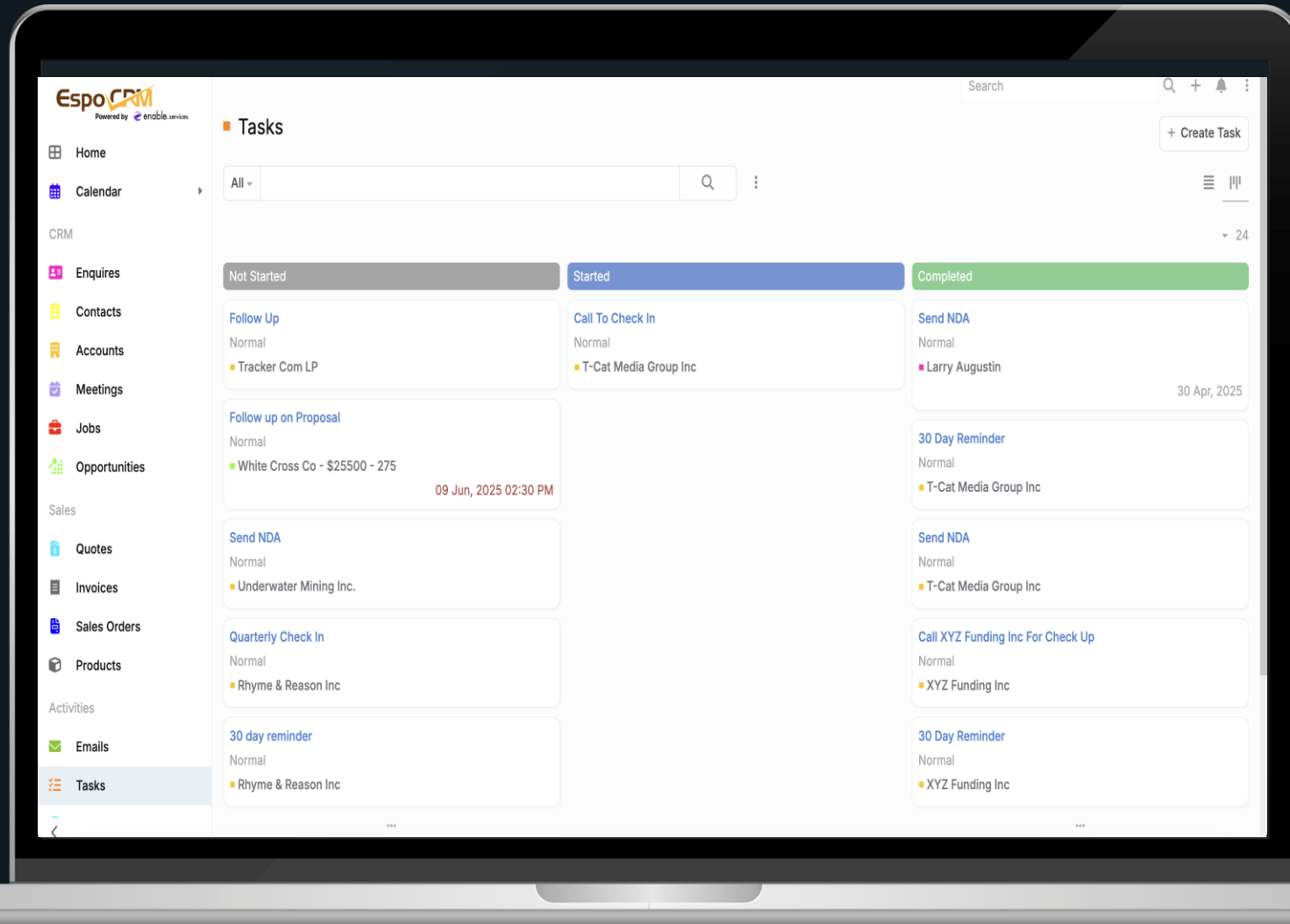


Since
2023



Since
2021

EspoCRM User Interface



- **User-Friendly Interface –**
A clean, intuitive interface is crucial for ease of use and adoption.
- **Highly Customisable Layout –**
Being able to tailor the system to specific business needs is a top priority.
- **Workflow & Automation Integration –**
Automating tasks saves time and improves efficiency.
- **Inline Editing for Efficiency –**
Quick edits without navigating away improve productivity.
- **Role-Based Access Control –**
Ensuring data security and access control is critical for businesses.
- **Dynamic Panels & Relationships –**
Helps organise related data effectively within records.
- **Real-Time Data Updates –**
Keeping information up-to-date is essential for accuracy.
- **Mobile-Friendly & Responsive Design –**
Accessibility on different devices enhances flexibility.
- **Tabbed Interface for Better Organisation –**
Reduces clutter and makes navigation smoother.
- **Dashlets & Widgets –**
Custom widgets provide quick insights but are more of an enhancement than a necessity.



Account Management

- Centralise all client accounts, engagements, and service requests in one system
- Capture and manage client details, services provided, contracts, and key contacts
- Track account status from onboarding through ongoing service delivery and renewal
- Automate client onboarding, reminders, and follow-up communications
- Manage complex or multi-service accounts with clear ownership and visibility
- Log and track all client communications and documentation against each account
- Assign and prioritise account tasks across teams to ensure timely delivery
- Reduce manual administration with structured workflows and automation
- Use dashboards and reports to monitor account performance, workload, and deadlines
- Maintain a complete account history to support long-term relationships and personalised service

Analytics And Reporting

- Leverage powerful analytics and reporting to gain clear, actionable insights
- Evaluate event performance using Custom Reports
- Monitor key metrics in real time with Report Panels and Dashlets
- Export reports to Excel and CSV for further analysis and sharing
- Automate report distribution by scheduling results to be sent via email

Client Support

- Deliver better client support with streamlined service tools
- Provide self-service portals where clients can submit questions and requests
- Control access to EspoCRM data using configurable portal roles
- Track and manage all issues with full case history in the Cases module
- Automatically create cases from emails using the Email-to-Case feature

Sales Cycle Automation

- Streamline your process with sales cycle automation from lead to close
- Track and prioritise opportunities to focus on the most valuable deals
- Automate the creation and sending of quotes, sales orders, and invoices
- Manage products and services using configurable product catalogues
- Customise your sales pipeline with Entity and Layout Managers to match your sales process
- Forecast future revenue accurately with built-in revenue forecasting tools

Centralised Client List

- Maintain a centralised client database for Contacts, Leads, and Accounts
- Customise customer profiles using Entity and Layout Managers to match your processes
- Link meetings, tasks, calls, and emails directly to the relevant records for full visibility
- Quickly locate records using powerful search filters
- Import and export data easily to support seamless record migration
- Synchronise contacts with Google and Outlook using the optional

EspoCRM The Number One Open-Source CRM

Global Reach, World-Class Excellence



50,000 +
Companies
Using
EspoCRM



In 163
Countries
Of The
World

2014

10 Years
Since
First
Release



A Partnership Built On Trust

EspoCRM Wins
The Foss 20i
Awards 2025
In The CRM &
Support Category
For Solutions
That Make
Meaningful
Impacts On
Businesses



EspoCRM Wins
Software Suggest
Efficiency Award
2025 For
OutStanding
Peformance &
Innovation





- Consistent data hosting boasting 99.97% uptime over the last decade.
- Seamlessly integrate with various platforms, offering unlimited API calls.
- Located in a Tier 3 UK Data Centre, boasting ISO certifications.
- Receive swift online & phone support.
- Written in PHP, JavaScript, and Python.
- LAMP Stack.
- Benefit from network redundancy ensuring maximum data availability, coupled with frequent backups (on-site every 4 hours, off-site daily).
- Trusted CRM hosting since 2006. enableCloud: Secure, high-performance cloud hosting tailored for CRM and business applications.
- EspoCRM: Optimised hosting and seamless integration for EspoCRM, ensuring peak performance and reliability.

Consulting (Architect Design)

We recognise that each organisation is unique. Our approach involves collaborating closely with our customers to identify their goals, map processes, and catalogue pain points. This thorough understanding allows us to determine the most suitable EspoCRM products and implementation strategies, ensuring a tailored solution that meets each organisation's specific needs and optimises their business processes for improved efficiency and success.

Configuration (Build)

Our accredited experts configure, launch, and customise EspoCRM to exact specifications. We adapt the platform to meet unique organisational needs, improve business processes, and overcome obstacles identified during the consulting phase. By ensuring a tailored solution, we optimise performance and provide a seamless, efficient, and effective CRM system that drives business success and enhances overall productivity.

Customisation (Core Code)

Our accredited experts create custom code to meet the unique requirements of your organisation. By adapting EspoCRM to align with your specific business processes and addressing any challenges identified during consultation, we ensure a bespoke solution that enhances efficiency and effectiveness. This custom coding guarantees that EspoCRM integrates seamlessly into your operations, optimising performance and driving business success.

Data Migration (Alignment)

Our specialists ensure a seamless transition of your data to EspoCRM using CloverETL. We meticulously plan and execute the migration process, leveraging CloverETL's powerful data alignment capabilities to maintain data integrity and minimise disruption to your operations. This ensures that all critical information is accurately transferred and readily accessible in the new system, providing a smooth and efficient migration experience that supports your business continuity and success.

Integration (Automation)

We core code and integrate solutions into EspoCRM using core code and APIs such as REST and SOAP. Additionally, we employ our enableFlow solution with ApacheAirflow and work with middleware tools like Workato, Talend, Make, and Zapier. This enables integration with nearly any existing on-premise or web-hosted application software, including accounting, CMS, ERP, and eCommerce systems, ensuring a comprehensive and flexible CRM solution tailored to your needs.

Training (Onboard)

We design training programs for EspoCRM around customer deployments, requirements, and tailored software systems. By focusing on role-specific needs and emphasising hands-on experience and user adoption, we ensure the most effective use of time. Our training helps users quickly become proficient with EspoCRM, maximising the system's benefits and supporting successful implementation and utilisation within the organisation.

Support (Success)

We provide an industry-leading Success program that supports your deployment of EspoCRM from before going live and for as long as customers wish to engage with the service. This includes full account management, with comprehensive guidance and support, ensuring that your organisation maximises the value and effectiveness of EspoCRM. Our dedicated team is there every step of the way to ensure your success and satisfaction with the platform.

Why enable.services?

Proven Approach

- Extensive experience delivering successful CRM and systems implementation projects
- Deep expertise in open-source technologies
- CRM specialists with an average of 5–20 years' hands-on industry experience across the team
- Established, repeatable best practices for EspoCRM implementations, refined through real-world delivery

Proven On-Time, On-Budget Implementation Methodology

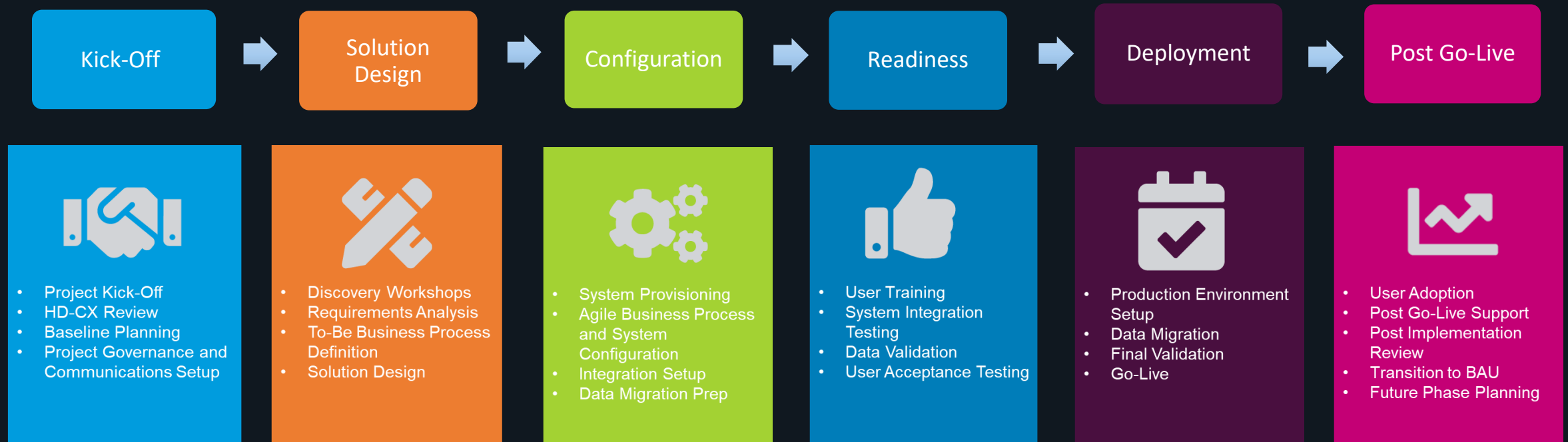
- Structured time-to-value delivery approach focused on rapid, measurable outcomes
- Dedicated project team support throughout every phase of the implementation lifecycle
- Ongoing support to accommodate evolving business requirements, including UK hosting and compliance needs

Well Connected

- enable.services' Projects Team works in close partnership with EspoCRM
- Ability to leverage internal EspoCRM teams, trusted partners, and specialist expertise to fast-track issue resolution
- Direct access to EspoCRM executive management, ensuring alignment, escalation, and long-term success

EspoCRM Implementation Mythology

- ✓ Consistent, repeatable methodology for end-to-end “HD-CX” project delivery
- ✓ Focused on client outcomes and user adoption
- ✓ Pre-defined activities, tools and templates for each step in the delivery cycle
- ✓ Rapid time-to-value (“let the platform do the work”)
- ✓ Defined project communication and governance model





UK 07:30 to 18:00 Monday to Friday



Before we can work out how quickly we need to respond to an issue, we first have to triage it and assign it a priority. Support operatives usually prioritise tickets based on the matrix below

Impact / Urgency	High Urgency	Medium Urgency	Low Urgency
High Impact	Priority 1 - Critical	Priority 2 - High	Priority 3 - Medium
Medium Impact	Priority 2 - High	Priority 3 - Medium	Priority 4 - Low
Low Impact	Priority 3 - Medium	Priority 4 - Low	Priority 4 - Low

Once a priority has been established for a ticket, we'll use the table below to work out the applicable time that will apply for the various stages of the ticket lifecycle.

Priority	Respond within*	Plan within*	Resolve within*
Priority 1 – Critical	2 hrs	4 hrs	8 hrs
Priority 2 – High	4 hrs	24 hrs	48 hrs
Priority 3 – Medium	8 hrs	50 hrs	70 hrs

EspoCRM with  **enable.services**

UK Hosted and Supported

