**App Plus**

Search theo First Last + And de fan biet trong form

Ket noi voi PM Tax de print pdf

Khi khach goi zo, hoi thong tin va show ra KH tim kiem ngay

* Goi fone vao: show Client
* Show lich su hen
* Tao hen: chon ngay trong trong Calendar
* Lam giong MyCase’Calendar
* Reminder :
* Calendar : chuan + list Staff theo cot : chon All, multi-select
* Staff share calendar
* Extend Appointment

Assign Task cho KH

Khi co thay doi, notify toi toan bo Staff lien quan

Task zo Quotion

**MyCase**

Client: co site rieng: Upload documents

Document : upload cua Ent hoac Client

Quotation =>

* Request for DO: gui Accouting staff
* Acct staff create Inv from RDO
* Acct staff create DO: chuye ntoi WH keeper.

Status: un/completed

(PO) => DO => Inv => PL

Tich hop voi P&L

401K : 18K max duoc tax deductive

Rut khi nao cung dc, tinh thanh income

Charity: 4.5K => tax duduct

Can: Note vao Step cua Workflow

Can: attach file vao Note

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CRM:

1. File/Case nhieu Staff fu trach

* Can : tung step cua Workflow duoc assign cho tung Staff

Tich hop Email: gui email lien quan den File => vo Inbox cua Amicus

Note:

* Content
* Send note as Stick to :
* Note type:

Call Client: log from => end time to charge => record thanh file .wav => store lai de bill Client

Hoac Quotation cho DV tu van