

Case Studies

Integrated Finances works with Portal to launch a tech-enabled accounting firm

Problem

Integrated Finances wanted to make it possible for clients to have a single home from where to make payments, send messages, access files, and submit intake forms.

Solution

Integrated Finances created a customer portal with billing, filesharing, messaging, and intake forms modules enabled. As a result, Integrated Finances was able to cancel 4 subscriptions, offer clients a unified experience, and save on support time.

Modules

- ✓ Billing
- ✓ Filesharing
- ✓ Messaging
- ✓ Intake Forms

Build vs. buy

Building and maintaining a custom portal is more difficult than it seems

Many service businesses attempt to build home-grown custom portals. At first the launch goes well, but over time most organizations realize that maintenance work, implementing improvements, supporting international customers, and maintaining security become expensive distractions.

Integrated Finances is a modern accounting firm that serves individuals and businesses, with a special focus on technology companies.

"An accounting firm's online brand is paramount for customer acquisition. After switching to Portal, we've had clients sign up directly from our website, go through an automated onboarding experience and seamlessly transition to becoming clients."

Alex, President at Integrated Finances

Portal offers the functionality you need to quickly get started today but supports integrations and extendability as you scale. In addition, our engineering team is ready to help with custom API integrations.