BMD COM

Platform for Clients

BMD Com – The Platform for Clients

BMD Com, the web-based Platform for Clients, is the ideal solution for communication between tax consultants and their clients.
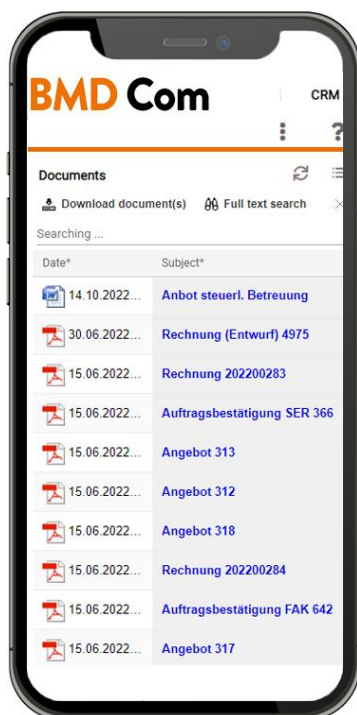
Clients can conveniently access BMD Com any time from a tablet or smartphone in order to obtain and share information with the tax consultancy. All types of files and reports can be shared; from individual documents to business assessment reports, with the possibility of even tracing back and opening each file at its origin. In addition, clients can upload scanned receipts
to conduct digital booking. If the client conducts his own bookkeeping, all relevant documents needed for balancing purposes can be uploaded over the platform and the tax consultant can also send them back to the
 client as needed.
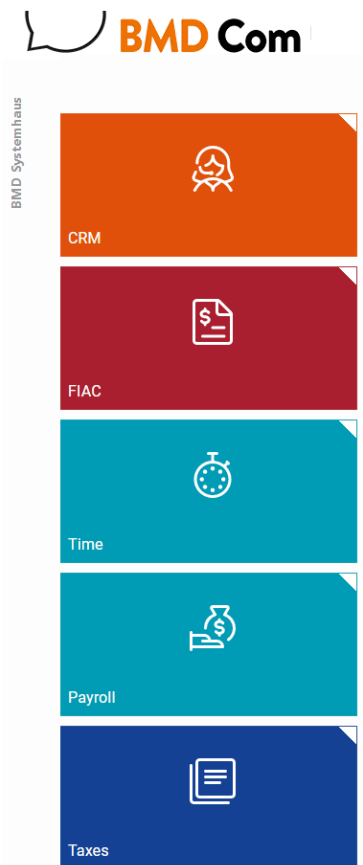
The BMD App for Access to the Web-platform

Gaining access to the Client Platform is as simple as downloading the BMD App, available in the smartphone app store. First the login details are determined together with the tax consultancy. Thereafter, the client has access to all information. The data is responsive and can be displayed well even on a smartphone. All available data can be seen by swiping up, down, or sideways.

CRM Features

CRM features enable clients to manage important data:

- all **documents** that were released for viewing can be viewed (e.g. contracts, confirmation letters, reports, etc.). Documents already viewed by clients are marked and clearly distinguishable. The document search can be optimized by filtering according to various criteria, for example, by category.

- **Representative** – the client knows his representative – including phone number and e-mail address. He knows which services were agreed upon and can establish contact with him directly.

- **Meetings** – prearranged and public meetings (marked as public) can be accessed in the NTCS Calendar.

- **Forms** – templates of various forms can be downloaded and printed any time.

- **Customers** – the perfect CRM – quick and direct communication with the selected customer – it is simple to make phone calls, send e-mails, navigate, view account sheets and open items including receipt images, archive documents to each customer, and edit master data.

- **Client info** – the client receives information chronologically, documents belonging together can be opened via simple touch.

The Databox for Clients

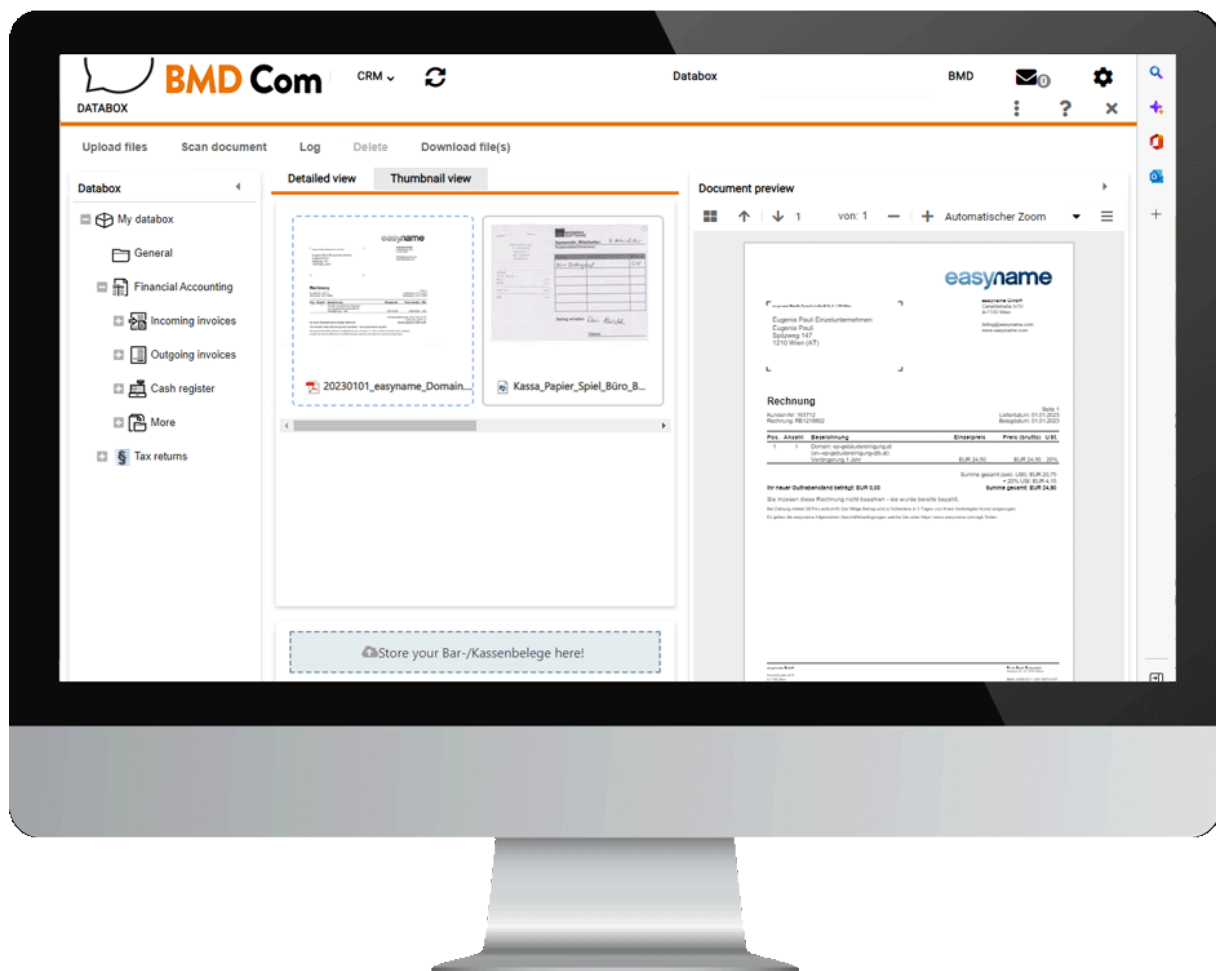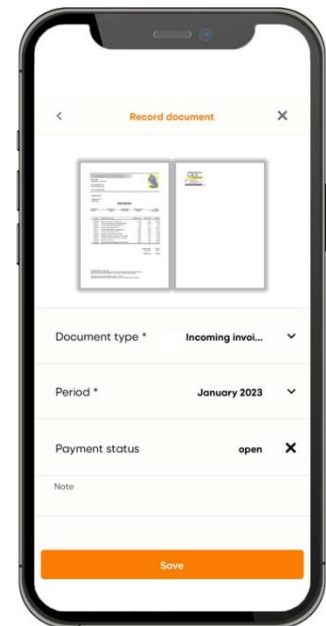**Easy Exchange of Documents with the Tax Consultancy**
Data can be transferred and shared smoothly using the Databox provided by the tax consultancy (for example, the bookkeeping performed by the client is sent to the tax consultant for balancing of accounts, or sent back to the client after the accounts have been balanced).

Transmitting of Documents for Booking
With the Databox feature, documents scanned by the client can also be transmitted to the tax consultant for booking purposes. The documents automatically arrive in the inbox containing documents for digital processing, meaning they can immediately be processed further within the tax consultancy.

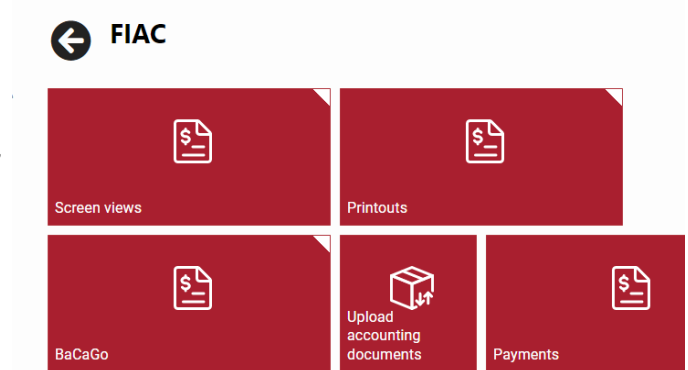**Photographing Documents with a Smartphone**
The picture of the document is immediately transferred to the bookkeeping inbox of the tax consultancy which is specially designated for the client.

FIAC Features

Important financial accounting reports and analyses are also
available through the web-platform. Additionally, accounting entries can be made or invoices can be paid.

- **Business Analysis:** for the precise analysis of a company – from a cumulative depiction of the company to individual documents. As long as documents have been archived, they can be viewed over the web-platform.

- **Liquidity Overview:** keep track of liquidity with a smartphone! With BMD Com the client receives sales data including turnover and liquidity.

- **Account sheet:** all account types can be viewed. Documents that have been archived in the corresponding position on the receipt can be instantly viewed with a smartphone.

- **OI-List:** not only can it be viewed, but payment reminders or payment blocks can also be issued interactively. The tax consultancy can initiate payment reminders or bank transfers.

- **Payment Proposal and Direct Debit:** the client can carry out payment proposals independently and generate online banking files.

- **Printing List:** the client selects a desired printout independently and receives a notification as soon as it is available in BMD Com.

- **Kontool:** clients are informed about their current economic situation over an interface to the established tool for business analysis

- **finAPI:** by integrating finAPI, BMD has added another possibility for direct access to bank transactions

■ **BACAGO:** The cash ledger can be accessed and entries can be made from anywhere with a PC or tablet. Using the BMD Scan Modul, it is even possible to transmit the original receipt to each position in the ledger. The submitted data can then be checked in the tax consultancy, corrected if necessary, and automatically booked. Attached receipts are saved automatically in the client's archive under the respective account position. Original receipts can be retrieved from the archive, account position, or from the cost center.

Digital Signature with XiTrust

Documents such as contracts, invoices, or monthly balances, for example, can not only be viewed anytime on the go, but can also be signed using a smartphone. This enables your clients to act completely independently. They are no longer dependent on the opening hours of agencies or on separately arranged meetings.

A fully integrated **Chat** makes it safe and easy to communicate directly when needed.

COAC-Features
The client can view cost accounting reports flexibly regardless of time and location.

Time Features

Many time features can be managed over BMD Com like clocking in and out, for example. The various recorded times can be transferred to the HRM software for subsequent salary calculation. Depending on the level of permission that has been granted, a list displaying the present and absent employees can also be viewed, or time recordings of a specific employee can be seen.
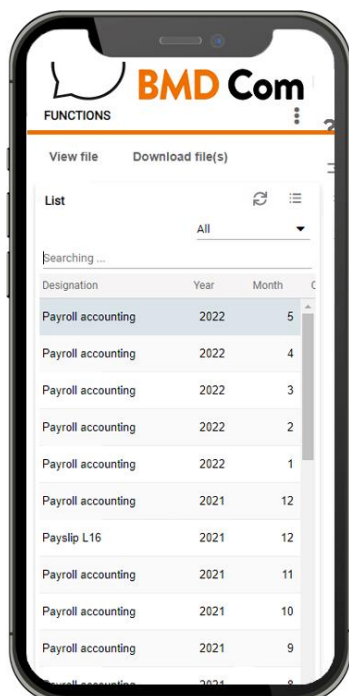
- **Recording time**
  The client's employees can record their work times online from any location where internet is available.

Salary Features

Employees have access to features over the web including being able to enter various data, access salary slips, etc.

- **Salary Slip Portal for each Employee:**
  This aspect of BMD Com is aimed at clients who wish to send their employees monthly and yearly salary slips electronically. It allows every employee, who has the necessary granted permission, to access all salary-related documents directly over the Web Portal.
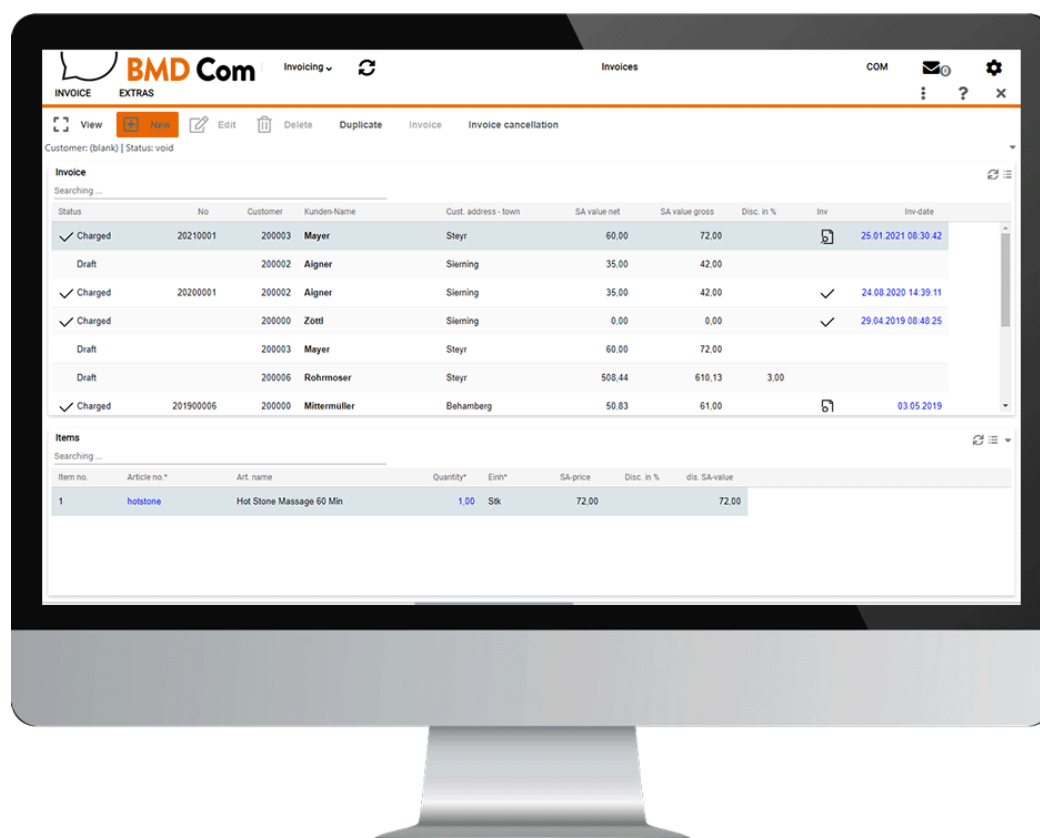
- **Record Business Trips:** record travel expenses on the go! – Including all relevant legal requirements for business trips domestic and abroad, as well as the automatic transferring of data to the salary calculation software.

- **Create employee data**: creating new employees and temporary personnel is quick and straightforward; data is clearly arranged and can be adjusted as needed.

Invoicing Com

BMD Com offers an integrated solution for online invoicing suitable for one-person companies and small businesses. The Tool **Invoicing Com** allows clients to issue proper invoices quick and easy. Clients no longer struggle with issues associated with using spreadsheets and word processing software such as missing information, issuing multiple invoices with the same number, or false total amounts and tax rates due to these fields not updating automatically.

Screenshot: Invoices

Security

The BMD Com client platform allows all participants to work safer and more efficiently. The data transferred is encrypted through a secure connection.

Two-Factor-Authentication is also available for the highest level of security.

BUSINESS SOFTWARE

BMDAUSTRIA:

BMD Systemhaus GesmbH
Sierninger Straße 190
4400 Steyr
Tel. +43 (0)50 883
Fax +43 (0)50 883 66

verkauf@bmd.at

Storchengasse 1
1150 Wien
Tel. +43 (0)50 883

Brauquartier 7/Top 9
8050 Graz
Tel. +43 (0)50 883

Landstraße 66
4020 Linz
Tel. +43 (0)50 883

Franz-Brötzner-Straße 12
5071 Wals bei Salzburg
Tel. +43 (0)50 883

BMDGERMANY:

BMD GmbH
Donnerstraße 10
22763 Hamburg
Tel. +49 (0)40 55 43 92 0

verkauf@bmd.de

BMDSWITZERLAND:

BMD Systemhaus
Schweiz AG
Oststrasse 8
8500 Frauenfeld
Tel. +41 (0)52 723 00 55

verkauf@bmd.ch

BMDHUNGARY:

BMD Rendszerház Kft.
Madarász Viktor utca 47-
49.
1138 Budapest
Tel. +36 1 235 7090

sales@bmd.hu

BMDSLOVAKIA:

BMD Business Solutions s.r.o.
Suché Mýto 1
81103 Bratislava
Tel. +421 (0)2 208 61 990

bratislava@bmd.com

BMDCZECH REPUBLIC:

Komplexní informační
technologie s.r.o. (VOP)
Chelčického 15
37001 Budweis
Tel. +420 387 312 345

sales@kit.cz

01/2023

www.bmd.com