



TASKS MENU

# Accountant & Financial Advisors

Accountant & Financial Advisors Most requested tasks.

**PRO  
TOP** A



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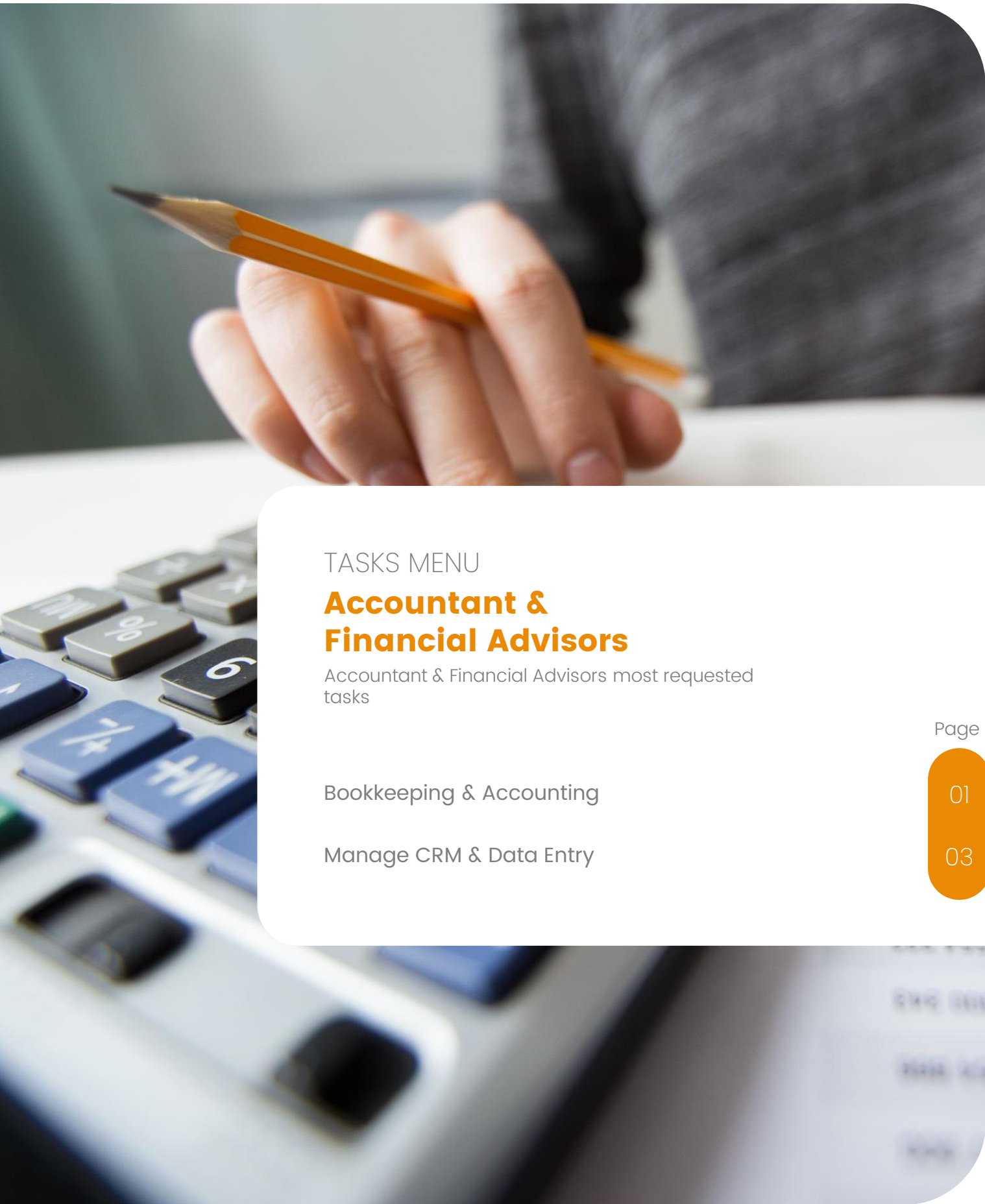


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TASKS MENU

**Accountant &  
Financial Advisors**

Accountant & Financial Advisors most requested tasks

Bookkeeping & Accounting

Manage CRM & Data Entry

Page

01

03



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## Bookkeeping & Accounting



Payroll management.



Processing accounts payable, receivables.



Create quotes/invoices to send to the company's leads & clients.



Send invoices/bills via email to each client.



Follow up & receive payments.



Paying Bills.



Preparing Financial Statements.



Create & send receipts to clients who have completed payments.



Categorize expenses from bank accounts and/or credit cards.



Reconciling credit cards and bank statements.



Reconciling supplier and customer statements.



Checking the accuracy of others' calculations.



Numerical data recording.



Other basic bookkeeping tasks.



## Manage CRM & Data Entry

02



Entering the data from the accounting into the Accounting CRM.



Convert files into digital format in Excel sheets.



Help the company organize, clean, update, and maintain the client database.



Maintain all communication and client data up-to-date.



Add new clients & update existing ones into the CRM system.



Process and handle customer support orders and/or tickets.



Repetitive data entry (entering online payments or uploading invoices received from vendors).



Create and publish jobs, events, listings, etc in 3rd party sites: Facebook, Craigslist, etc.



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**Book A Call**



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