

Liscio Launches New Platform to Eliminate Friction in Client-Accounting Firm Relationships

Liscio, the single portal for client communication, today announced five major enhancements that eliminate friction in the accounting firm-client relationship.



SAN FRANCISCO, CALIFORNIA, UNITED STATES, November 13, 2023 /EINPresswire.com/ -- [Liscio](#), the single portal for client communication, today announced five major enhancements that eliminate friction in the accounting firm-client relationship. These enhancements allow firms and their clients to seamlessly collaborate across email, texting, and secure messaging without creating multiple information silos for the firm.

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Chris Farrell, CEO

Liscio unveiled the following platform advances which benefit both accounting and bookkeeping professionals and their clients including:

1. Timeline

Liscio now presents every client communication on a single page. The data presented include emails, text messages, files, signatures, client requests, and more. Firms can view the timeline by Contact and Account.

2. Email Integration

Liscio integrates with both Outlook and Gmail. The integration automatically presents client emails on the Timeline, ensuring a complete client communication record.

3. Two-way Business Texting

Liscio’s business texting feature keeps business texts inside the firm while also keeping employee personal phones personal. By taking advantage of two-way business texting, firms can not only better accommodate client communication preferences, but also take advantage of much faster response times than email.

4. Customizable Client Request Templates

Liscio's 'Requests' feature enables accounting firms to create their own client request templates for virtually any client request -- from onboarding to tax organizers. Requests provide firms with the ability to ask a series of questions with various answer types including Yes/No, short answer, and file imports. The requests can be sent as one-offs or saved as templates for repeated use.

Combining Requests with Timeline, Email Integration, and Texting leads to a more organized, efficient, and intuitive information gathering process between firm and client.



Chris Farrell, CEO, Liscio

5. Mobile web

Clients expect technology to work where and how they work. Liscio's new mobile web experience complements its existing mobile applications to offer a comprehensive experience across any device. By offering both mobile web and mobile app experiences, Liscio now offers occasional users the ability to quickly interact with their accountant without having to download an app while also providing power users all the benefits of a dedicated app.

"Client experience remains the core differentiator for firms. As firms and their clients continue to move toward an all-digital relationship, bringing all of the communication channels into a single, easy-to-use package is essential. Today's releases further our mission to tighten the bonds between firms and their clients by reducing the amount of administrative friction on both sides. said [Chris Farrell](#), CEO of Liscio. "

About Liscio

Liscio is the only client experience solution for accounting firms that combines email, texting, secure messaging, and client requests in a single place. No matter how clients want to work with an accounting firm, Liscio makes it possible without requiring any changes to back-office systems. To learn more visit Liscio.me or to request a demo visit: [Request Demo](#).

Chris Farrell
Liscio
info@liscio.me

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