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comprehensive work flow management, document management, and time management capabilities, as well as a client portal that facilitates communication between firm and client.

Mary Girsch-Bock • Apr. 23, 2016



Best Fit: Well suited to accounting firms large and small, and with its flat-rate

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Potential Limitations.

- Limited timer function

TaxWorkFlow is designed for a Windows platform, and offers firms of all sizes comprehensive work flow management, document management, and time management capabilities, as well as a client portal that facilitates communication between firm and client.

BASIC SYSTEM FUNCTIONS – 4.75 Stars

TaxWorkFlow can be deployed in one of three ways; as a traditional desktop version, with database management handled in-house, as a hosted product on TaxWorkFlow's own servers as a cloud-based product, or hosted on a third-party cloud vendor. The Dashboard interface simplifies firm workflow, providing users with an intuitive user interface where all system functions can be accessed.

A drop down menu can be found at the top of the screen, with a workflow screen displayed prominently, offering access to main system functions, such as Clients, WorkFlow, Documents, Time & Billing, and Email and Calendar Integration. The product interface is modeled after Microsoft Office, and features the well-known ribbon interface, and is fully customizable, with users able to create an interface that is suited to their particular needs.

TaxWorkFlow is an all-inclusive system, and does not offer modules. Instead, all clients receive the same functionality, with the option to utilize the functions as they become comfortable with them. Firms can organize all tasks by staff role, with all roles defined by the firm, with the ability to delegate tasks, reassign workloads, and create custom workflow rules that are custom to each particular firm's needs.

Users can quickly access all client information in the View Clients function. A sidebar

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determine what tasks and functions they are able to perform within the product. Bulk emails can be processed and sent to clients as needed, and automated reminders can be set up to remind clients about relevant dues dates.

TIME MANAGEMENT CAPABILITIES – 4.5 Stars

Users can track time using the included timer, which can be accessed from the toolbar. Click on 'Begin Work' to begin recording time for any project. The timer can only be used for one project at a time, and clicking on the Begin Work button a second time will stop the timer for the first project and begin timing work on the second project. Users can also choose to add time manually, by clicking on the 'Add New Work Time' button, which can be accessed from any toolbar in TaxWorkFlow. If entering time manually, users can also choose a billing status for the time being recorded, such as Billable, Non-billable, and Billed. Managers can view employee work time entered from the View User Work Time function. Any recorded work times can be added, edited, or deleted using this function as well. Invoices and estimates can be synched into QuickBooks or exported to Excel as needed.

INVOICING CAPABILITIES – 4.5 Stars

TaxWorkFlow allows users to easily create and edit both invoices and client estimates. Users can quickly create an invoice when entering time manually. During setup, users can define what accounts should be included in the invoice function, or accounts can be added on the fly as an invoice is being processed. Invoices are created under the Billing option, with users able to quickly select a client, add notes, or edit information. Items can be added to an invoice at any time after creating it, and existing data can be edited or deleted as well. The Services Estimate Wizard allows firms to quickly prepare an estimate for a client, adding any services that are expected to be performed for that client. Estimates can also be modified, or converted to an invoice. Users have the option to email invoices and estimated directly to

clients, or for a more secure communication, opt to utilize the client portal, where all

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management that an assigned task has failed, setting the task back to the preparation stage in the workflow. Each task has a corresponding deadline assigned, and tasks can be prioritized if needed. Multiple tasks can also be organized into Tickets, which are designed to provide system users with a set of instructions that determines the order in which each task on a ticket is processed.

Firm partners and managers can easily monitor staff member time usage and productivity levels, and a series of progress reports are available that provide more detail on task/ticket progress, allows management to adjust task priorities as needed. TaxWorkFlow also contains both excellent document management as well as CRM capability. Documents can be attached to a specific client file, and the document tree, displayed to the left of the client screen, provides a convenient list of all documents currently saved in that particular client's file. Firms can provide their clients with the option to upload documents to the document archive, or they can access them directly from the client portal. Templates are available that can be customized with firm branding, for professional invoices, statements, estimates and email communication.

INTEGRATION/IMPORT/EXPORT – 5 Stars

TaxWorkFlow offers excellent integration with Microsoft Office products, with users able to access Office functions and email directly from the product's toolbar. Integration with QuickBooks allows users to easily synch invoices to the product, as well as access client QuickBooks files. Client documents are easily shared between employees, and the use of the client portal provides clients with a secure method to access confidential documents. Documents can be printed directly into the database as a PDF, as well as sent directly to the client portal.

Client data can be easily imported from QuickBooks or from an Excel spreadsheet, and data can also be exported to Excel, XML, HTML, or TXT files.

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Firmworks is available for an annual fee of \$1,500, which includes all product training, support, an unlimited number of users, unlimited clients and storage, and a client portal. For firms with the need for comprehensive workflow management capability, this product really can't be beat.

2016 RATING: 4.75 Stars

Firm Management

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