

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA.CITP

## **DMA2Go Workflow Show Notes Episode 5**

**Recorded June 24, 2008**

**Duration: 0:39:44 38.2 MB**

Regular Guest: John Higgins, CPA.CITP, Principal at [www.CPACrossings.com](http://www.CPACrossings.com)

Episode # 6 will record live on Tuesday, July 22, 2008 at 11:00am EDT at [www.TalkShoe.com](http://www.TalkShoe.com).Â Topic will be "Portals" .

### **History of workflow:**

- Ability to print to PDF file
- Dual monitors
- PDF annotation tools
  - PDFlyer from CCH
  - Tic, Tie & Calculate from Acct1st
  - Doc-It
- Firms then eliminated paper files
- Then the discovered the need for workflow

### **Concept of workflow**

- in analog world the floor was the inbox & the credenza the outbox, or perhaps vice-versa
- notes were verbal
- relied on paper routing sheets

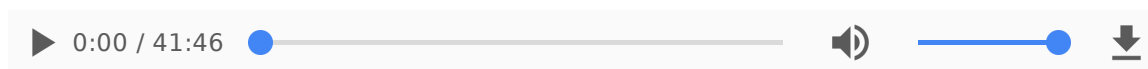
Software needs to evolve further — they are not as mature as many document

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

- Microsoft SharePoint
- XCM is the only stand-alone workflow system available today

Workflow systems like Thomson GoFileRoom attempt to duplicate the concept of a Redrope client file and add automatic routing, review notes, resolution, etc. Some firms want to track time, too — but workflow shouldn't duplicate the time & billing component of a practice management system. Workflow is not necessarily scheduling programs like [www.StaffTrack.com](http://www.StaffTrack.com). Small firms might like Office Tools Pro or TimeMatters/Billing Matters from Lexis-Nexis.



CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved