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## PRODUCT & SERVICE GUIDE

# Latest Version of TaxWorkFlow Offers New Features, Enhanced Interface

TaxWorkFlow, LLC has launched TaxWorkFlow Version 2.0, the latest release of the company's TaxWorkFlow practice management solution.

Isaac M. O'Bannon • Jul. 28, 2014

TaxWorkFlow, LLC has launched [TaxWorkFlow](#) Version 2.0, the latest release of the company's TaxWorkFlow practice management solution. The new version of the software contains many new features that were developed in response to the needs and feedback of the software's users including:

- **A more intuitive and customizable user interface** makes it easier to start using and work with TaxWorkFlow. Users can customize the visual style of the application, optimize menu buttons, and table views to fit their special needs
- **The new Dashboard feature** allows new users to quickly learn and use the concepts of Tasks, Clients and Exceptions—the key elements of the software—all organized intuitively in one place. The Dashboard combines multiple fields into one view and its quick search capability makes it very easy to find all relevant data.
- **Enhanced email functionality** allowing TaxWorkFlow users to streamline communication with customers by using automated email notifications, reminders, and built-in customizable email templates. Email campaign templates can use more individual client fields, such as Taxpayer or Spouse names, and delivered based on client email preferences to reduce spam.
- **Advanced editing capability** allows free-formatting of rich text with graphics in all data fields, including emails and email templates, enabling firms to easily

present a professional corporate image when communicating with clients.

“TaxWorkFlow is a unique workflow solution that has been developed and tested by tax and accounting professionals,” said Jonathan Medows, a CPA and TaxWorkFlow, LLC partner. “We are pleased to offer TaxWorkFlow Version 2.0 with its many enhanced features as part of our ongoing commitment to ensuring that our users have access to the highest quality productivity-enhancing tools that will save them time and money.”

To help users take advantage of the new features of TaxWorkFlow 2.0 as quickly as possible, TaxWorkFlow is offering all users a complimentary one-on-one onboarding session. This session is designed to assist TaxWorkFlow users in optimizing their workflow productivity with the software.

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