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Management Features

The new version of the software contains many new features developed to meet the needs of independent tax and accounting firms in four key areas of their practices: workflow, staff management, communication and client relationship management.

Isaac M. O'Bannon • Jul. 06, 2015



TaxWorkFlow, LLC has launched [TaxWorkFlow](#) Version 3.0, the latest release of the company's TaxWorkFlow practice management solution.

The new version of the software contains many new features developed to meet the needs of independent tax and accounting firms in four key areas of their practices: workflow, staff management, communication and client relationship management. In addition, the latest version now offers both cloud and in-house data storage options, so clients can choose where their data is stored based on their own security, compliance and IT preferences.

The latest enhancements to TaxWorkFlow 3.0 include:

Workflow Management

Building on TaxWorkFlow's unique, completely customizable workflow rules that allow users to follow their own business processes, Version 3.0 incorporates:

- Recurrent projects with different recurrence periods (i.e. biweekly, semi-monthly,

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Document Management Enhancements

A key component of the TaxWorkFlow platform is its robust document management capabilities. Tax and accounting firms can save time archiving documents with the software's drag-and-drop functionality and automated pick-up/filing system—or allow their clients to securely upload their documentation to the integrated document archive via the client portal.

Version 3.0 provides improved document management including:

- Wizards for batch importing and exporting.
- Advanced search options to reduce the time firms spend looking for client documentation from minutes to just seconds.
- The ability to print directly into the document management system from any program and perform rules-based actions, such as publishing to client portal and notifying the client of this action.

Email Management Enhancements

TaxWorkFlow now takes the management of client information and communication to the next level with these enhancements:

- Tighter integration with email hosting providers, such as Microsoft Exchange and Google.
- Increased productivity and control in locating client correspondence and communicating to clients with powerful templates, workflow rules, and the ability to read and send email right from the TaxWorkFlow application.
- Improvements in the TaxWorkFlow email campaigns module allowing users to more efficiently communicate with clients by providing updates and deadlines related to their engagements as well as information regarding new service offerings and firm information via email.

“The most current version of TaxWorkFlow has many enhanced features to

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Technology

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