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Time Billing, Due Date Management, Secure File Sharing & Electronic Signature.

Expand your firm's task management efficiency by including the optional workflow module. Workflow gives you the added ability to track the specific work assignments necessary to complete a main task. You can generate steps for all tasks or customize different subtasks for different groups of main tasks.

Once set up, tasks can be selected and edited using the scheduling calendar, notifications screen or the main deadline management screen shown below. Recurring tasks can be automatically set up along quarterly, monthly, weekly and daily time frames. With the task progress tracker, staff and managers can individually be assigned tasks in addition to the partner assigned at the client level.

Tasks can also be associated with a work code or engagement to expedite time entry and improve control of the budgeting process. If you include our time and billing module, the software for tracking employee time also records time spent on individual tasks and print reports comparing budget to actual hours.

The work-flow management and tax form setup screen below shows how master tasks or tax forms with due dates are created in our task management software. You can set up as many master federal and state due date items as you like. For more information and an example of the alerts and notifications screen – see the example