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integrated chat, scheduling functions, referral tracking ...

Nov. 10, 2020



Taxaroo, a tax practice management software suite of tools that has helped tax businesses and CPA firms go virtual for over five years, has increased functionality for the COVID-19 era and the upcoming tax season. Taxaroo will be the first to bring to market a video and texting integration, as well as built-in Spanish workflows. In total there are seven new features, including:

- **Integrated Chat, Texting and Video Calls:** Connect with your clients from everywhere with all communications in one place.
- **Calendar and Scheduling:** Automated follow ups sends out emails reminding clients based on your preferred send cadence.
- **Import/Export Tools:** Eliminates redundant data entry by importing and exporting to your tax software.
- **Spanish Workflows:** Translate your tax practice to communicate with Spanish clients in their language.
- **Mapped Portal Drive:** Store, share and manage client files in a dedicated drive account with secure access from your desktop computer.
- **Print-to Portal:** Print tax returns directly from your tax software or any program right into your Taxaroo client document storage portal. Easily request signatures every time.

- **Referral Program:** To encourage clients to spread the word about your tax practice

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“I am excited for what we are bringing to the industry that I love so dearly,” said Knox Wimberly, CEO of Taxaroo. “My past experiences in molding the first national virtual tax practice have carried over directly into our software development to build exactly what is needed to operate an efficient online or hybrid remote tax practice.”

A recent McKinsey report showed that digital-enabled sales interactions are now 2x as important than they were prior to COVID-19. The technologies Taxaroo offers help tax firms adapt and compete to stay relevant in the new normal of this virtual world. The tools in Taxaroo's software enable tax preparers and accountants to work with their customers anytime, anywhere—on any mobile device or web browser.

Firms can continue using their existing professional tax software along with Taxaroo, without having to jump around to different software throughout their day. This creates a streamlined, tactical practice management system that offers a significant cost savings compared to paying for multiple software that don't always integrate with each other.

For additional information, visit www.taxaroo.com.

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