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TaxWorkFlow provides the best value in comprehensive, customizable practice management for tax and accounting professionals. Easy to use and extremely powerful, TaxWorkFlow simplifies and automates workflow while providing added-value tools to ensure success in every process-driven engagement from day-to-day accounting to tax and audit work.

CPA and accounting firms looking for an affordable and effective practice management should look no further than TaxWorkFlow—a single solution that integrates everything your practice needs including:

- **Customizable Workflow Management** allowing you to design and implement the structure, controls, and communications that meet the unique needs of *your* firm. The backbone of TaxWorkFlow is its advanced workflow management system that facilitates the automated organization of work for each client into a series of tasks and tickets that can be customized on a universal or individual level—ensuring the successful completion of every engagement.

- **Staff Management** capabilities that take the guesswork out of teamwork. With TaxWorkFlow, firm administrators and managers can assign individual user passwords and logins to control access to information and to effectively manage workflow progress by monitoring who is responsible for each task, how much progress has been made, and when the work required has been completed.

- **Document Management and Storage** that is streamlined and powerful. TaxWorkFlow allows you to easily store documents directly in the database of solution instead of on your local machine, categorized in folders and subfolders according to your preferences. Documents can also be automatically selected, categorized and filed by client with an add-on program. In addition, TaxWorkFlow puts an end to time wasted searching for documents with its comprehensive search function.

- **Customer Relationship Management (CRM)** capabilities that make adding new clients easy while providing a consolidated view of client profiles, tax data and documents, referrals and discounts, and account activity. TaxWorkFlow streamlines client management and supports your targeted marketing efforts and client care efforts, too.

- **Time and Billing Management** to enable effective firm resource management and more accurate client estimates and billing. TaxWorkFlow makes it easy to transition from project to project, create billing-driven workflow and simplify client pipeline management.

- **Client Portal Services** using TaxWorkFlow's client-facing portal residing on your firm's website you can give your clients the convenience of online appointment scheduling and document exchange while your firm can save time and money to deliver documents to customers electronically and/or have them upload the document directly into your centralized storage database where it will be filed under a certain category under this customer.

- **Email Management and Hosting** specifically designed for accounting firms.TaxWorkFlow gives your firm the ability to track all electronic communications (both internally and external client communications). In addition, your hosted email interface makes it easy to deploy email and mail campaigns to notify your clients about new services, firm updates and events and, of course, deadlines.

- **Integration with Key Accounting Software** to increase your firm's productivity and efficiency. TaxWorkFlow's flexible platform integrates seamlessly with many accounting solutions. For example, TaxWorkFlow's QuickBooks® integration allows you to securely connect to your customers' QuickBooks company file as well as QuickBooks accounting features and payment processing services.

- **Site Hosting** with the option of storing your data in the cloud or in-house at no extra cost with unlimited IT support.

Schedule your personal webinar now to improve the productivity and profitability of your practice with TaxWorkFlow!

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