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TaxWorkFlow, LLC announced today that it has released the beta version of TaxWorkFlow, proprietary practice management software designed to simplify the tax preparation process while ensuring optimal organization of client data, efficient internal and external communication, and successful tax return completion.

A unique hybrid software application, TaxWorkFlow combines the processing speed of a PC desktop platform with the enhanced data storage capacity of a cloud-based solution and incorporates many powerful capabilities allowing every step of the tax preparation process to be managed and completed effortlessly, efficiently, and accurately.

"TaxWorkFlow was created to address a gap in the market for a practice management solution that streamlines and supports the complete tax preparation process from end-to-end," explained Jonathan Medows, a CPA and TaxWorkFlow, LLC partner. "The software was designed to ensure that efficiency, accuracy, clear communication, and productivity exist at every step of the tax preparation process from both the firm and client perspective."

TaxWorkFlow provides tax professionals with complete control over the tax preparation process. The software currently has many robust features including:

- Comprehensive customer relationship management (CRM) capabilities allowing firms to consolidate the contact information, tax data and documents, and account activity for each client.
- A convenient client-facing tax portal that resides on the website of tax professionals enabling appointment scheduling, document exchange, and communications management to be executed seamlessly.
- The ability to link business and individual returns from a Master Account record with a built-in tickler system to ensure that a comprehensive tax return is completed on time for every client.
- The ability for administrators to assign individual user passwords and log-ins to control access to information and to monitor workflow progress.
- Automatic flags for exceptions when certain conditions are met or certain requirements fail with the option of manually setting and customizing exceptions at the individual client level at specified points in the workflow.
- A robust client communication module including automatic email delivery triggered by the tax return processing workflow in addition to communication archiving for accessibility for multiple firm members.

"The commercial version of TaxWorkFlow is currently being developed with additional features," said Medows. "There has been significant interest in the product to date, therefore we wanted to give professional tax firms the opportunity to try out the beta version prior to the coming tax season to see how easily and effectively the solution enables them to control and optimize the tax preparation process."

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