



taxWorkFlow

QUICK START GUIDE

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For all questions regarding this document, please email support@thetaxworkflow.com.

This Quick Start Guide will provide you with a general overview of TaxWorkFlow to help you start simplifying your tax preparation process as quickly as possible. TaxWorkFlow offers a variety of tools for optimal organization of client data, efficient internal and external communication, and successful tax return completion. Please refer to the complete TaxWorkFlow User Guide for detailed information about using these tools for tax preparation and other engagements.

1. Getting Started: Adding Clients

To begin using TaxWorkFlow you must add clients and information about them into the system's database. You must also add your company information and set-up any TaxWorkFlow users you wish to have.

TaxWorkFlow uses a master- slave relationship when creating a client that has both business and personal tax returns. When a business return is created a "master" of the return can be defined linking it to a personal or another business return. By establishing this relationship between business and personal returns, TaxWorkFlow will ensure that K-1 information is imported into the business return and that ownership relationships are mapped.

The first step in the tax return preparation workflow is to create a new client. To do this, click "Customers – Create customer" or "Ctrl + F3" and fill in all required fields.

Click the "Save" button to save new customer to the database or "Ctrl + Enter" to save and close this form. Complete information about client management is described in the TaxWorkFlow User Guide.

Corporate info:	Corporate name: Norris Group Inc	Position:	Entity type: Multi-Member LLC					
Tax info:	Customer ID: 2	Return type: 1065	Last 4 EIN: 4200	Filing status:	<input type="checkbox"/> Sales tax <input type="checkbox"/> Deleted <input type="checkbox"/> Retail <input type="checkbox"/> Disable meetings	Served by:		
Taxpayer info:	Prefix: Mr.	First name: John	Middle name:	Last name: Smith	Suffix:	Last 4 SSN:	Birth date: 12/14/1966	
Taxpayer phones:	Cell: 999-5555-1111	Work:	Home:	Other:	Fax:			
Taxpayer email:	Email address: john@smith.com	<input checked="" type="checkbox"/> Include in email lists		Taxpayer password:	Remind password			
Spouse info:	Prefix: Ms.	First name: Susan	Middle name:	Last name: Smith	Suffix:	Last 4 SSN:	Birth date: 12/17/1971	
Spouse phones:	Cell: 999-5555-222	Work:	Home:	Other:	Fax:			
Spouse email:	Email address: susan@smith.com	<input type="checkbox"/> Include in email lists						
Address:	Address line 1: 161 West 106 Street	Address line 2:	Address line 3:	City: New York	State: NY	Zip: 10025	Country: USA	
<input checked="" type="checkbox"/> Include in mail lists Copy to clipboard: <input type="button" value="Address"/> <input type="button" value="Taxpayer"/> <input type="button" value="Spouse"/> <input type="button" value="Folder Label"/>								
Referral:	Status: Not referred	Referred by:	Referred on: 12/30/1899	Credit:	Applied on: 12/30/1899			
Comments:								
Master account:	-- THIS IS THE MASTER ACCOUNT --						Show slave accounts	
Notes Events Tasks Tickets Documents Referrals Messages Email Addresses								
<div style="border: 1px solid black; height: 20px; width: 100%;"></div>								
Press CTRL-ENTER to save and close; ESC to cancel and close								
							Save	Close

2. Using Client Tickets to Optimize Workflow

Client tickets are the backbone of TaxWorkFlow's streamlined system. Each client ticket is comprised of a series of tasks. *It is important to note that a task is **one event** of a series of events that must occur for the workflow in a particular ticket to be completed.* Tasks can be customized at the universal or individual customer level, to ensure that the unique needs of each client are met. There is also a built-in tickler system to ensure that a full tax return is completed on time for every client. In addition, administrators of the program can assign individual user passwords and log-ins to control access to information and to monitor workflow progress.

Client: George Smith

Assign to: John Smith

Due: No deadline Deadline: 08.05.2014 Due after: Priority 5: Sample default instructions for Peter Smith

Instructions: Your task instructions here

Attach files:

#	Timestamp	File name	Type	Size	Category	Published?	Title
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Press CTRL-ENTER to save and close; ESC to cancel and close

OK Cancel

In the Create Task window, you can choose a client from the drop-down menu, assign tasks to your staff or to yourself, determine deadlines, and prioritize tasks, then related instructions and files can be added. To manage task dependencies and teamwork more effectively, you can organize typical tasks into a ticket—which is composed of at least two or more tasks. A ticket is a preprogrammed set of instructions that allows workflow to progress in a sequential order. Tickets help reproduce the same sequence of steps over and over again for various clients. Below is an example of the ticket with three simple task instructions (prepare, review, and print):

Create Ticket

Ticket type: Prepare non tax return
 Prepare tax return v 3.0
 Tax Extension
 Correspondence
 Prepare tax return v 3.0 - BUSINESS

Customer: -- N/A --

Ticket owner: John Smith

Due: No deadline Deadline: 06.05.2014 Ticket year: 2013

Ticket Instructions: Sample ticket instructions

Order	Owner	Task Name	Task Instructions
1	John Smith	Prepare	Sample default instructions
2	John Smith	Review	Sample default instructions
3	John Smith	Print	Sample default instructions

Attach files:

#	Timestamp	File name	Type	Size	Category	Published?	Title
Add...							

Press CTRL-ENTER to save and close; ESC to cancel and close

OK Cancel

Each scheduled task of the new ticket has its own order number. You move over to the next task in the queue after you complete the current task. This is called "upgrading the ticket", i.e. advancing the ticket up the scheduled pipeline of tasks until all are completed. Downgrading the ticket means taking a step back, e.g. from the "review" stage back to the "prepare" stage. Each task of the ticket and a whole ticket itself can be assigned or re-assigned to any user.

3. TaxWorkflow Exceptions

TaxWorkflow allows you to add many exceptions to address issues that arise in your practice. Exceptions stop the processing of a ticket when a certain condition is met. When an exception is raised, the ticket cannot be upgraded until the exception is cleared.

Exceptions can be managed using the "Exceptions" button on the Edit Task or View Tasks forms. From this list, you can review task exceptions, email a reminder, or clear exceptions. To raise an exception, select the task or ticket and click the "Raise Exception" button. You can also raise an exception with custom information by double-clicking the left mouse button or by clicking a right mouse button and selecting "Raise exception with custom info" from the drop-down menu. By raising the exception, you will effectively put a road block on the further execution of the ticket until you receive the missing information from the client.

New Task
 Edit Task
 Complete Task
 Reassign Task
 Begin Work
 End Work
 Fail Task
 List
 By task type
 By ticket type

Drag a column header here to group by that column

* Priority	Company	TP Last Name	TP First Name	Re	Task Type	Task Instructions
1		Smith	Customer 1		Custom Task	експеримент
4		Smith	Customer 1		tax return	Prepare
5		Smith	Customer3		tax return	Prepare
1	Norris Group Inc	Smith	John	10	Custom Task	Arrange meeting wi
0	Norris Group Inc	Smith	John	10	Custom Task	Send draft to client
3	Norris Group Inc	Smith	John	10	return v 3.0	Review Tax Returns and
2	Norris Group Inc	Smith	John	1065	2012 Tax Extension	Review

Downgrade Ticket
 Raise Exception
 View Exceptions
 Add or Remove Buttons