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WorkFlow – Feature Overview

Contents

WorkFlow – Feature Overview

WorkFlow is our enhanced practice management solution. With TaxCalc's Practice Manager working together with WorkFlow, you can take even more control of how your practice works by creating, customising and co-ordinating all of your Jobs and Tasks in just a few simple steps.

How can WorkFlow help?

As a New TaxCalc User

Take control of your practice and boost productivity with our practice management toolkit. WorkFlow is the administrative powerhouse of your practice, creating efficiency across the board. Create Jobs, such as completing tax returns, and break them down into a series of Tasks, like requesting records from your client. Progress your work exactly as you need to using customisable workflows so that you don't miss those all important statutory deadlines.

As an Existing TaxCalc User

You may already be using Tasks to assign work, keep track of assignments in progress and set any notifications as deadlines approach. With WorkFlow you can now create Jobs, break them down into a series of separately configurable Tasks and progress your work exactly as you need to, using customisable workflows. Each Task can also be automated so that when one Task is complete, the next one begins. Use your existing database or the TaxCalc supplied demonstration database to try out the new functionality.

As an Existing TaxCalc User, New Practice Manager User

If you're not yet taking advantage of our powerful practice management toolkit, you can take control using WorkFlow as the administrative powerhouse of your practice, creating efficiency across the board. Create Jobs, such as completing tax returns, and break them down into a series of automated Tasks, like requesting records from your client. Progress your work exactly as you need to, using customisable workflows so that you don't miss those all important statutory deadlines. Use your existing database or the TaxCalc supplied demonstration database to try out the new functionality.

This guide provides an overview within the TaxCalc demonstration database of:

- **Work Management**
- **Active Work**
- **Job Templates**
- **Dashboards**
- **Multiple Offices for your Jobs and Tasks.**

Please note: We advise for trialling the software the demo database is used as this data will no longer be available once the trial ends.

Anything entered into your live database can only be undone manually and, in some cases, cannot be undone at all. However, if you do set this up in your live database these changes will be saved should you decide to purchase the product.

See [KB3067 – How do I switch between my live database and the demo database?]

Additional resources

After reviewing this guide, you may also wish to explore additional resources listed below:

- For more information on Practice Manager and WorkFlow, visit our **website**
- For details on how to setup WorkFlow, see the **Getting Started with WorkFlow guide**
- For all WorkFlow guidance, see **KB3057 – WorkFlow: Collateral**
- You can also find extensive help within **TaxCalc > Help > Contents > TaxCalc Help Manuals**.

Work Management

Practice Manager > Work Management

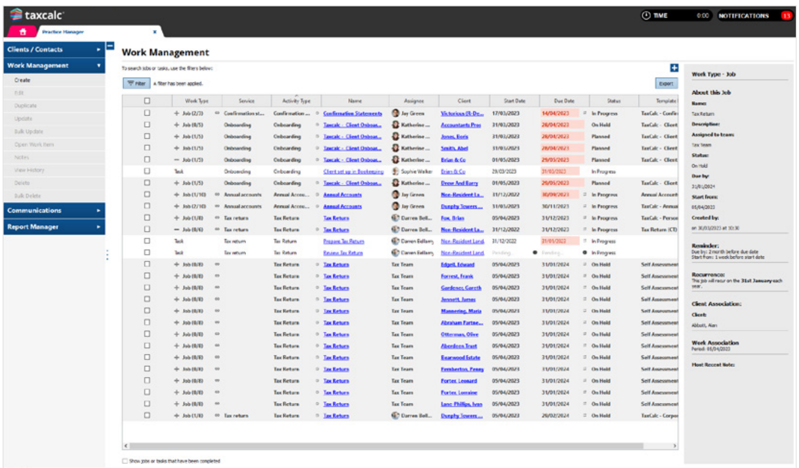
Work Management allows you to view and manage single and recurring Jobs and Tasks.

From here you can:

- **Create, edit, duplicate, update or delete Jobs and Tasks**
- **Open the Work Item linked to the Job or Task.**
- **Add any Notes**
- **View the Work History which details the Job or Task activity as well as any notes.**

From the Work Management screen, you can see all the Jobs and Tasks associated with your clients. You can also expand specific Jobs to display the details of the Tasks within each Job.

Please note: Some options, for example Jobs, are only available if you have purchased WorkFlow.



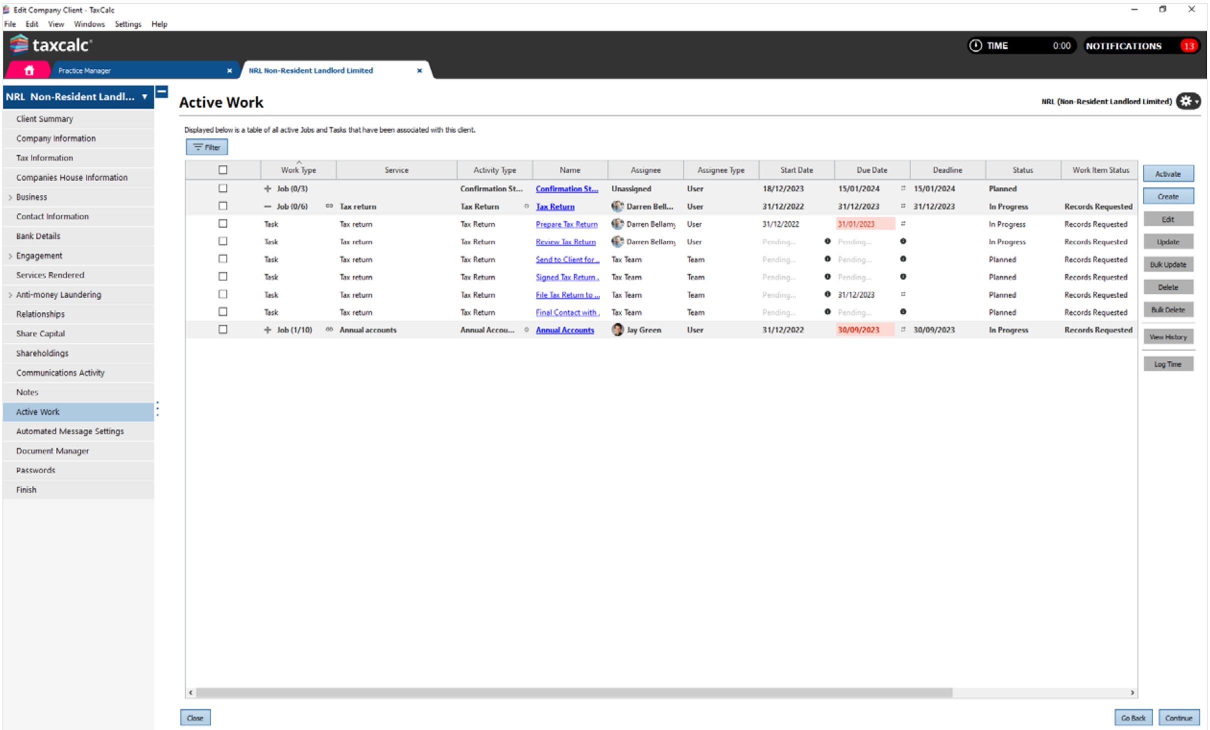
Active Work

Practice Manager > Client Record > Active Work

Within a client record, the Active Work page allows you to manage all Jobs and Tasks associated with a specific client. You can see if the Jobs or Tasks are active or not and activate them where appropriate. Activating a Job for a service enables you to select the service you would like to activate and start a Job from.

You can:

- **Create, edit, duplicate, update or delete Jobs and Tasks**
- **Activate Jobs or Tasks for a service that has been applied to the client.**



Please note: Some options, for example Jobs, are only available if you have purchased WorkFlow.

Job Templates

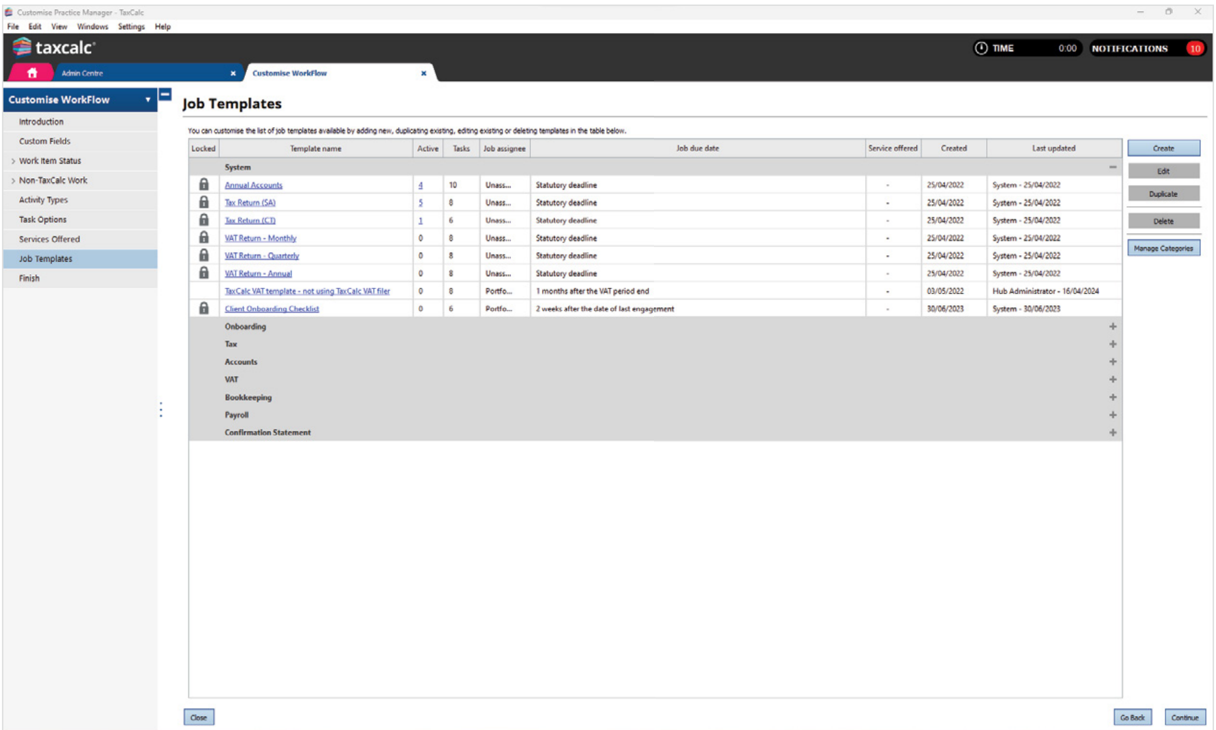
Admin Centre > Applications > Customise WorkFlow > Job Templates

If you are using Jobs and Tasks, you'll probably be using them for frequent work, such as Tax Returns. Instead of creating a new Job for every client each time you want to do a Tax Return, you can create a Job Template.

The Job Template can contain multiple Tasks to break down the different stages of a regular Job, however, instead of entering the details every time a Job is created, the fields are automatically populated with the selections made in the Job Template.

From the Job Templates page, you can create, edit, duplicate and delete job templates for the practice.

For more details on creating Job Templates see KB2978 - How to create a Job Template.



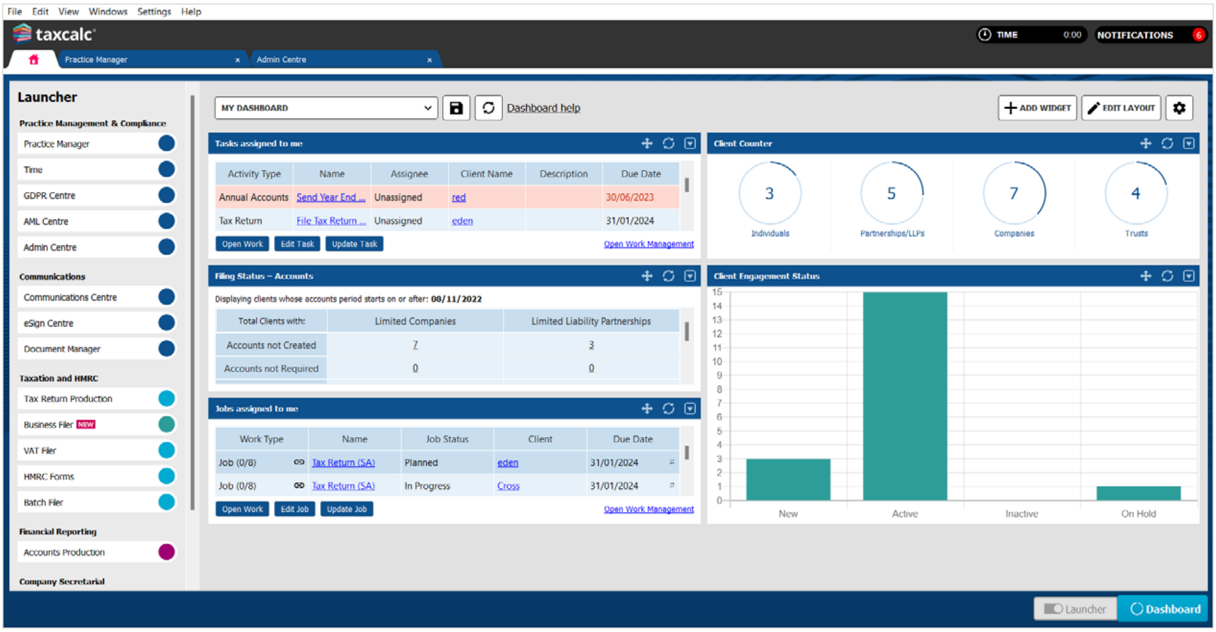
Dashboards

Dashboards display a collection of widgets that can be added, edited, removed and grouped to enable fast navigation to relevant high-level insights to your practice. It's designed to show data in a simplified structure for greater efficiency for our Practice Manager users.

You can use Jobs and Tasks widgets to see at a quick glance which Jobs and Tasks are assigned to you or to other users and at what stage each one is at. You can then filter them by Task type and status or just view the Task summary to show a simplified view of the total number of Tasks for specific Task types and statuses.

You can:

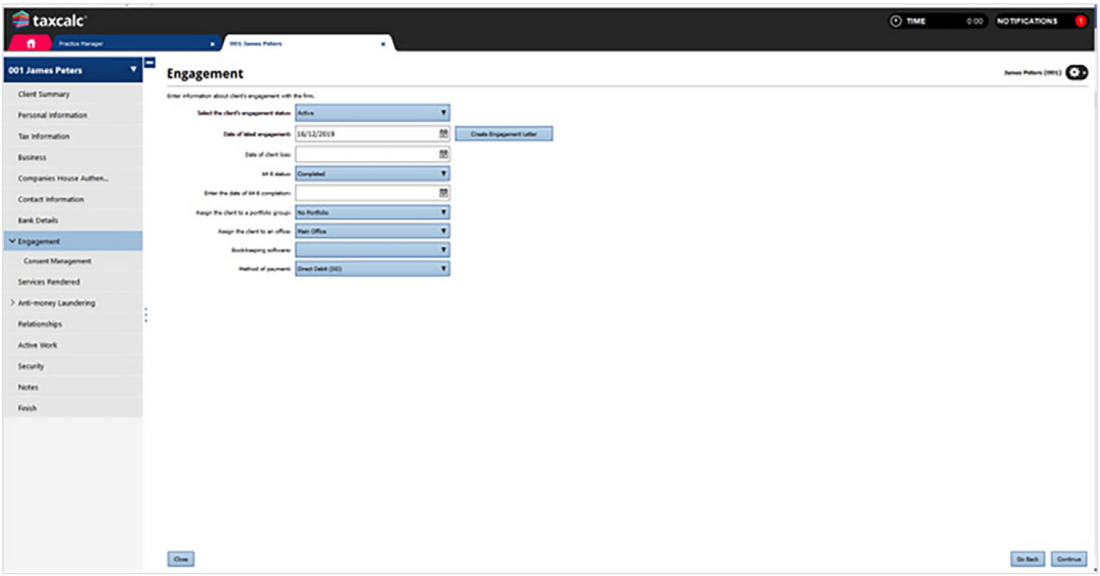
- **Manage dashboard owners and set new owners where required – accessible in Admin Centre**
- **Switch to different dashboards containing various TaxCalc widgets**
- **Create public dashboards that can be shared with other users.**



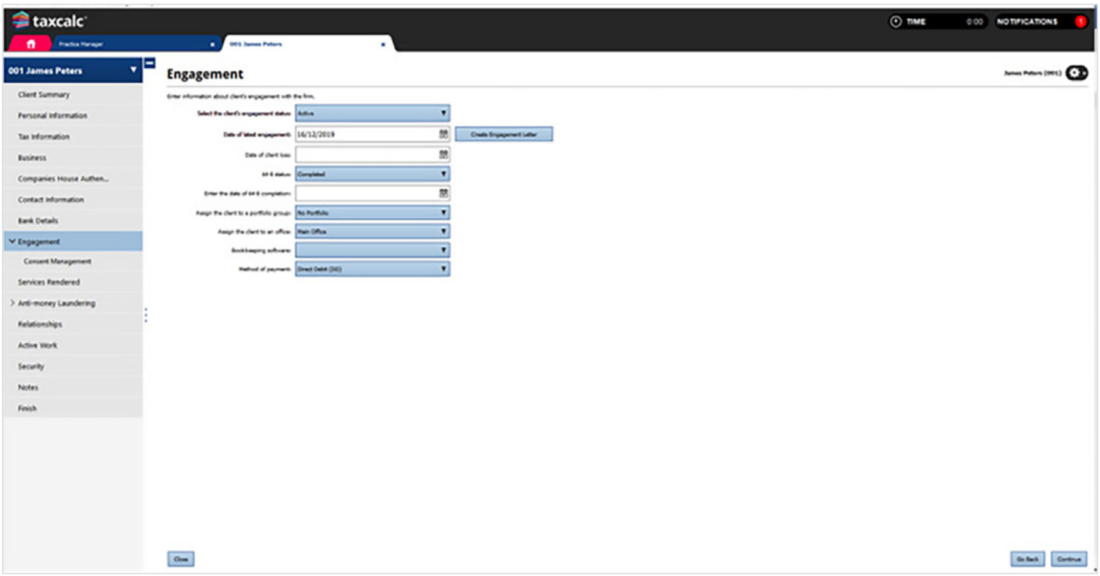
Multiple Offices

Admin Centre > Firm Details

Multiple Offices allows you to assign clients and users to specific offices:



You can then specify filing credentials on a per-office basis. Therefore, each user assigned to a specific office can utilise these credentials, allowing them to quickly populate the correct credentials for a given office when the firm filing credentials option is selected on HMRC or Companies House submissions.



You can filter your clients in dialogs and reports according to their assigned office.
You can also restrict users to see only the clients relevant to their assigned office.

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