



# **WorkFlow – Feature Overview**



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# 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

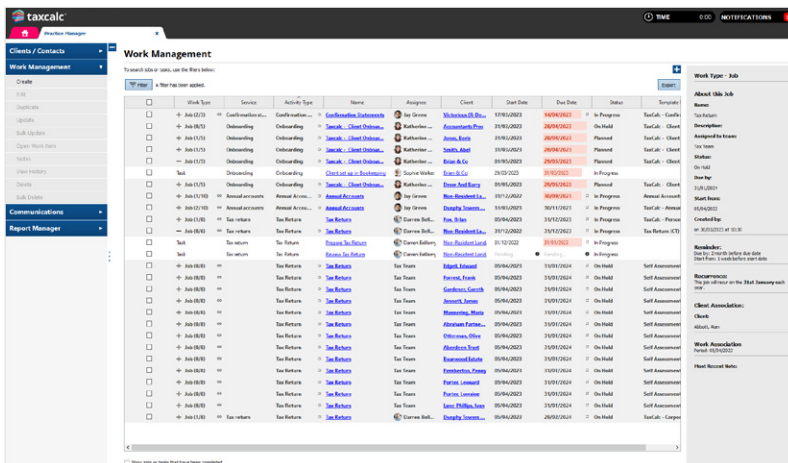
Work Management allows you to view and manage single and recurring Jobs and Tasks.

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.

Job/Task	Work type	Service	Activity type	Name	Assignee	Assignee type	Start Date	Due Date	Deadline	Status	Work Item Status	Actions
+	Job (0/1)		Confirmation St...	<a href="#">Confirmation Statement</a>	Unassigned	User	18/12/2023	15/01/2024	15/01/2024	Planned		Activate
-	Job (0/6)	Tax return	Tax Return	<a href="#">Tax Return</a>	Darren Bellamy	User	31/12/2022	31/12/2023	31/12/2023	In Progress	Records Requested	Create
	Task	Tax return	Tax Return	<a href="#">Prepare Tax Return</a>	Darren Bellamy	User	31/12/2022	31/01/2023		In Progress	Records Requested	Edit
	Task	Tax return	Tax Return	<a href="#">Send to Client for...</a>	Tax Team	Team	Pending...			In Progress	Records Requested	Update
	Task	Tax return	Tax Return	<a href="#">Signed Tax Return...</a>	Tax Team	Team	Pending...			Planned	Records Requested	Bulk Update
	Task	Tax return	Tax Return	<a href="#">File Tax Return...</a>	Tax Team	Team	Pending...	31/12/2023		Planned	Records Requested	Delete
	Task	Tax return	Tax Return	<a href="#">Final Contact with...</a>	Tax Team	Team	Pending...			Planned	Records Requested	Bulk Delete
+	Job (1/10)	Annual accounts	Annual Accoun...	<a href="#">Annual Accounts</a>	Jay Green	User	31/12/2022	30/09/2023	30/09/2023	In Progress	Records Requested	View History

**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](#).

The screenshot displays the 'Job Templates' page in the taxcalc Admin Centre. The page title is 'Job Templates' and it includes a sub-header: 'You can customise the list of job templates available by adding new, duplicating existing, editing existing or deleting templates in the table below.'

Locked	Template name	Active	Tasks	Job assignees	Job due date	Service offered	Created	Last updated	
	System								
🔒	Annual Accounts	8	10	Unass...	Statutory deadline	-	25/04/2022	System - 25/04/2022	+
🔒	Tax Return (SA)	5	8	Unass...	Statutory deadline	-	25/04/2022	System - 25/04/2022	+
🔒	Tax Return (CI)	1	6	Unass...	Statutory deadline	-	25/04/2022	System - 25/04/2022	+
🔒	VAT Return - Monthly	0	8	Unass...	Statutory deadline	-	25/04/2022	System - 25/04/2022	+
🔒	VAT Return - Quarterly	0	8	Unass...	Statutory deadline	-	25/04/2022	System - 25/04/2022	+
🔒	VAT Return - Annual	0	8	Unass...	Statutory deadline	-	25/04/2022	System - 25/04/2022	+
🔒	TaxCalc VAT template - not using TaxCalc VAT filter	0	8	Portfo...	1 months after the VAT period end	-	03/05/2022	Hub Administrator - 16/04/2024	+
🔒	Client Onboarding Checklist	0	6	Portfo...	2 weeks after the date of last engagement	-	30/06/2023	System - 30/06/2023	+
	Onboarding								+
	Tax								+
	Accounts								+
	VAT								+
	Bookkeeping								+
	Payroll								+
	Confirmation Statement								+

Buttons: Create, Edit, Duplicate, Delete, Manage Categories, Close, Go Back, Continue.



# 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.**

The screenshot displays the TaxCalc dashboard interface. The top navigation bar includes 'File', 'Edit', 'View', 'Windows', 'Settings', and 'Help'. The main dashboard is titled 'MY DASHBOARD' and features several widgets:

- Tasks assigned to me:** A table with columns: Activity Type, Name, Assignee, Client Name, Description, Due Date. It lists 'Annual Accounts' (Send Year End...) assigned to 'ted' with a due date of 30/06/2023, and 'Tax Return' (File Tax Return...) assigned to 'eden' with a due date of 31/01/2024.
- Filing Status - Accounts:** A table showing 'Total Clients with:' for 'Accounts not Created' (2) and 'Accounts not Required' (0) across 'Limited Companies' and 'Limited Liability Partnerships'.
- Jobs assigned to me:** A table with columns: Work Type, Name, Job Status, Client, Due Date. It lists 'Job (0/8) Tax Return (SA)' as 'Planned' for 'eden' and 'Job (0/8) Tax Return (SA)' as 'In Progress' for 'Cross'.
- Client Counter:** Four circular gauges showing counts for 'Individuals' (3), 'Partnerships/LLPs' (5), 'Companies' (7), and 'Trusts' (4).
- Client Engagement Status:** A bar chart showing counts for 'New', 'Active', 'Inactive', and 'On Hold'.

The left sidebar contains a 'Launcher' menu with categories like 'Practice Management & Compliance', 'Communications', 'Taxation and HMRC', 'Financial Reporting', and 'Company Secretarial'. The bottom right corner has 'Launcher' and 'Dashboard' toggle buttons.



# Multiple Offices

## Admin Centre > Firm Details

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

The screenshot shows the 'Engagement' form in the taxcalc system. The form is titled 'Engagement' and includes a sidebar with navigation options: Client Summary, Personal Information, Tax Information, Business, Companies House Authen..., Contact Information, Bank Details, Engagement (selected), Consent Management, Services Rendered, Anti-money Laundering, Relationships, Active Work, Security, Notes, and Finish. The main form area contains the following fields and options:

- Select the client's engagement status: Active
- Date of last engagement: 16/12/2019
- Date of client loss: [empty]
- UK status: Completed
- Enter the date of last completion: [empty]
- Assign the client to a portfolio group: No Portfolio
- Assign the client to an office: Main Office
- Bookkeeping software: [empty]
- Method of payment: Direct Debit (DD)

Buttons for 'Close', 'Go Back', and 'Continue' are visible at the bottom of the form.

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.

This screenshot is identical to the one above, showing the 'Engagement' form for client 001 James Peters. It displays the same sidebar and form fields, including the 'Assign the client to an office' dropdown set to 'Main Office'.

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.





