File InTime[™]

Due Date Tracking and Task Management Software

Your workload management solution for all your filing dates and project tasks

File In Time is the easy way to track all your filing due dates and projects. No matter how many returns you file, or how many clients you have, our software ensures you stay on top of your workload and never miss a filing due date.

Customizable solution designed to manage your office workload

- Assign multiple services/filings to your clients
- Set custom views of your workload
- Make task tracking easy and accountable
- Filter and sort by due date, status, or other criteria for a quick glance or a detailed picture
- Roll-forward completed tasks or extend tasks to new due date
- Filter tasks by dates or status to show only the relevant jobs
- Assign tasks and due dates to various staff levels

Save time, increase productivity and staff efficiency

- Over 25 standard reports are always instantly updated
- Set-up auto reminders for tasks due today, this week, or this month
- Instantly roll-forward completed tasks to create your due date list for the next period/year
- Print extension forms and automatically extend the due date
- Create and/or change multiple tasks in batches
- Give special permissions to specific users
- Automatically keep a record of the progress on each task (track up to 40 status fields)
- Create and save task views with specific staff member's workload
- Generate highly targeted management reports
- Improve record keeping and preserve historical data for instant access or easy Excel archiving

Benefits of File In Time

Create tasks for your entire operation

Generate tasks for all the jobs you have in your office. Each task is identified by the client, relevant dates, and the service being provided, from a tax filing to an office meeting.

Create custom views of your workload

Quickly filter and sort tasks for a quick glance or a detailed picture. You'll easily see the progress of your office workflow and rest assured that no deadlines will go unmet.

Create and print workload reports to stay on schedule

Custom reports help keep your staff on target from task creation, to extension, to completion.

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Get started quickly and easily

- Import client information from a comma or tab delimited file for quick setup
- Assign services with built-in dates for nearly 200 federal and state income tax returns or easily create your own custom services
- Assign service groups to a client for quick multiple task setup
- Choose or create the status codes you need to display for targeted information

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"I would not try to tackle what I do without File In Time. I recommend it to all my colleagues!"

- H. Widner, CPA

Effective tracking of the workload for each staff person and each return is "management." How well you manage ultimately determines the success of tax season-and the happiness and satisfaction of staff and partners.

- JOURNAL OF ACCOUNTANCY

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File In Time System Requirements

Computer: 1 GHz or higher Operating System: Windows XP or higher and Windows Server 2003 or higher (Citrix is being used successfully with no known issues in this environment) Memory: At least 40MB RAM Hard Disk Space: 20MB free disk space

"File In Time is a great software tool... This intuitive program can be a valuable practice management aid for accountants..."

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- Accounting Today

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File In Time Software

File In Time Software \$199/per user.

File In Time Maintenance is included the first year and includes updates and unlimited support.

The Annual Maintenance renewal is billed one year after purchase at \$100/year, per user.

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