

# File InTime™

Due Date Tracking and  
Task Management Software

## YOUR WORKLOAD MANAGEMENT SOLUTION FOR ALL YOUR FILING DATES AND PROJECT TASKS

File In Time software is the easy way to track all your filing due dates and projects. No matter how many returns you file in your tax practice or department, or how many clients you have, you will always be on top of your workload and make sure that you never miss another filing date.

### Designed to Manage Your Office Workload

- Customizable to fit your business
- Assign multiple services/filings to your clients
- Set custom views of your workload
- Increase your staff efficiency
- Improve record keeping
- Print workload reports to keep you and your staff on schedule

### The Standard for Due Date Tracking

- 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 and Increase Productivity

- 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
- Print quick workload reports or generate formatted pre-defined reports

### Increase Staff Efficiency

- Give special permissions to specific users
- Keep a record of the progress on each task (track up to 40 status fields) automatically
- Create and save task views with specific staff member's workload
- Generate highly targeted management reports
- Maintain historical data for quick access or export to Excel for easy archiving

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

- Accounting Today

## 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

File In Time Report  
01-15-2012  
Page 1

Tasks (sorted by due date and client)

Client	Service	Est	Status	Staff	Qty
Due Date: 01-15-2012					
Carle Corp (State/CA)	941	36	Review	MBN	
Eckhart Trust (Eckhart)	940	36		MBN	
Eckhart Trust (Eckhart)	941	36		MBN	
Hebert Museum (State/CA)	940	36		MBN	
Task Group 4					
Due Date: 02-28-2012					
James Dalbey DDS (Dalbey/DDS)	1099	36		VKG	
Brown Service (Brown/Dr)	942	36		MBN	
Franklin Utility (Franklin/Util)	1099	36		CCT	
Task Group 3					
Due Date: 03-15-2012					
ABGL Leasing Co. (ABGL/Leasing)					
ABGL Leasing Co. (ABGL/Leasing)					
ABGL Leasing Co. (ABGL/Leasing)					
ABGL Leasing Co. (ABGL/Leasing)					
Acme Enterprises (Acme/Ent)					
Acme Enterprises (Acme/Ent)					
Carle Corp (State/CA)					
CEC Management Inc. (CEC/Man/CE)					
Dwayne Tschis (Impressed/Dwayne)					
Eckhart Trust (Eckhart)					
Eckhart Trust (Eckhart)					
Eckhart Trust (Eckhart)					
Franklin Utility (Franklin/Util)					
George Communications (George/Com)					
George Communications (George/Com)					
George Media Group (Geo/Me)					
Task Group 16					
Due Date: 04-15-2012					
David Allen (Allen/Dave)					
David Allen (Allen/Dave)					
Jan Becker Trust (Becker/Trust)					
Thomas Brown (Brown/Trust)					
Thomas Brown (Brown/Trust)					
Thomas Brown (Brown/Trust)					
Thomas Brown (Brown/Trust)					
Notes entered as Staff					
Tasks assigned as Staff					
Notes entered as User					
Tasks assigned as Key Person					
Notes entered as Key Person					
Tasks assigned as Key Person					

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

- H. Widner, CPA

File In Time 2017.1 - Sample Tutorial Database

File Edit Task View View Tools Options Help

Tasks Selection Filter

Client: All, Dates: All, 1st Sort: Due Date, 2nd Sort: Client, 3rd Sort: None, Sort Order: Ascending

#	Client	Service	Due Date	Staff	Status	Ext	Notes	Received Info	In Progress	Review
1	Carter	1040ES-4TH	01-15-2017 Sun	RAK	Done					
2	DavisMig	PLANNING	01-15-2017 Sun	GRH	Done		12/12/16 14:08 - GRH - Call			
3	CableGuys	941	01-31-2017 Tue	MBN	Done					
4	Eckhart	940	01-31-2017 Tue	MBN	Done		11/14/16 10:39 - MBN - Foll			
5	HebertMuseum	940	01-31-2017 Tue	MBN	Done					
6	AcmeEnt	1139	02-26-2017 Sun	MBN	Done					
7	DahlbergDDS	1099	02-28-2017 Tue	VKG	Done					
8	ExtremSrv	W-2	02-28-2017 Tue	MDM	Done					
9	ABGL Leasing	4562CORP	03-15-2017 Wed	PAF	In Progress			03-01-2017 Wed	03-05-2017 Sun	
10	ABGL Leasing	4797CORP	03-15-2017 Wed	PAF	Received Info			03-09-2017 Thu		
11	ABGL Leasing	CA100	03-15-2017 Wed	MDM	Done					03-13-2017 Mon
12	Eckhart	CA100	03-15-2017 Wed	MBN	Waiting for Infr					03-09-2017 Thu
13	Eckhart	8283CORP	03-15-2017 Wed	MBN	Done					
14	ExtremSrv	1065	03-15-2017 Wed	PAF	Done		01/24/17 10:26 - PAF - Coni			
15	GeorgiaCom	GA600	03-15-2017 Wed	PAF	In Progress				03-04-2017 Sat	
16	ABGL Leasing	1120	04-15-2017 Sat	PAF	Done		10/10/16 - PAF - Contact Jc	02-01-2017 Wed	02-15-2017 Wed	02-20-2017 Mon
17	AcmeEnt	1120	04-15-2017 Sat	MBN	In Progress		03/01/17 - Client Meeting	03-16-2017 Thu	03-17-2017 Fri	03-20-2017 Mon
18	AllenDavid	1040	04-15-2017 Sat	GRH	Review		08/20/16 08:43 - GRH - Pre	03-01-2017 Wed	03-18-2017 Sat	
19	AllenDavid	CA540	04-15-2017 Sat	GRH	Review					
20	BaylodTrust	1041	04-15-2017 Sat	PAF	In Progress					

**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

### 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

## To order File In Time Software, call or complete order form and return today!

All products are backed by a one year money-back guarantee and unlimited product support for the first year.

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Title: \_\_\_\_\_ Industry: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

**Number of Users:** \_\_\_\_\_ **License** \_\_\_\_\_ **Amount** \_\_\_\_\_

Quantity \_\_\_\_\_ x \$199 = \$ \_\_\_\_\_

Digital Download with PDF User's Guide \$ **INCLUDED**

CD with PDF User's Guide (Shipping \$8) \$ \_\_\_\_\_

Sales Tax 7.75% (CA Only)\* \$ \_\_\_\_\_

\*Sales tax not applicable for download only orders.

**Total** \$ \_\_\_\_\_

### Payment Options (check one):

- Visa  MC  Amex  Discover  Check

Account #: \_\_\_\_\_ Exp Date: \_\_\_\_\_

Signature: \_\_\_\_\_

File In Time Annual Maintenance is billed one year after initial purchase and includes annual updates and unlimited product support. Annual Maintenance is \$100 per user and is included in the price for the first year.

LICENSE POLICY: Each user is responsible to purchase a license to use File In Time.