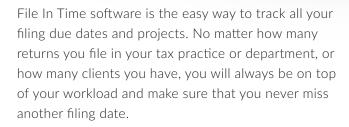
File In Time[™]

Due Date Tracking and Task Management Software

YOUR WORKLOAD MANAGEMENT SOLUTION

FOR ALL YOUR FILING DATES AND PROJECT TASKS



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

Date Range Custom

01-15-2017 Sun RAK 01-15-2017 Sun GRH 01-31-2017 Tue MBN

Due Date

1st Sort Due Date

2nd Sort Client

Sort Order Ascending

12/12/16 14:08 - GRH - Cal

01/24/17 10:26 - PAF - Cont

11/14/16 10:39 - MBN - Foll

-

čal

Cal

Done
Done
Done
Done
Done
In Progress
Received Info
Done
Waiting for Info

In Progress

Done
In Progress
Review
Review
In Progress

Staff Status

👸 File In Time 2017.1 - Sample Tutorial Database

Francisco

All

All

Client

Status

Key People

Client

Carter DavisMfg CableGuy

Eckher

AcmeEnt
DahlbergDDS
ExtremSrv
ABGLeasing
ABGLeasing
ABGLeasing
Eckhert
Eckhert

ExtremSrv GeorgiaCom ABGLeasing

AcmeEnt AllenDavid AllenDavid BaylorJTrus

Eckhert

File Edit Task View View Tools Options Help

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Service

940 1139

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8283CORP

GAGOO

PLANNING



"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

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!

Update

Received Info In Progress

03-01-2017 Wed 03-05-2017 Sun 03-09-2017 Thu

03-20-2017 Mor

NUM

| 03-04-2017 Sat | 10/10/16 - PAF - Contact Je | 02-01-2017 Wed | 02-15-2017 Wed | 02-20-2017 Mor | 03/01/17 - Client Meeting | 03-16-2017 Thu | 03-17-2017 Fri | 03-20-2017 Mor

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

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☐ CD with PDF User's Guide		
Sales Tax 7.75% (CA Only)* *Sales tax not applicable for down	\$ 	
Total		\$

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.

