File In Time™

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.

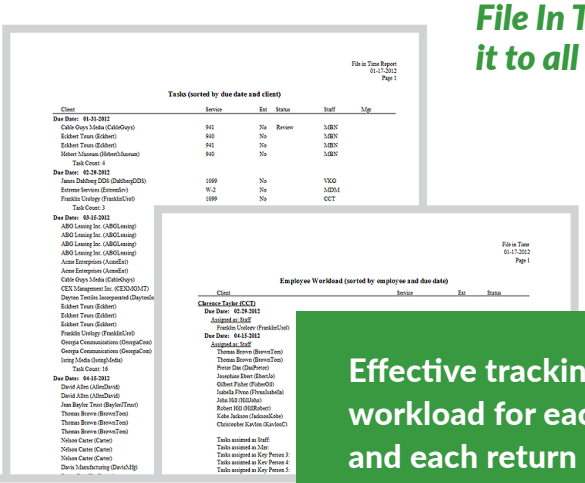


Get started quickly and easily

- 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

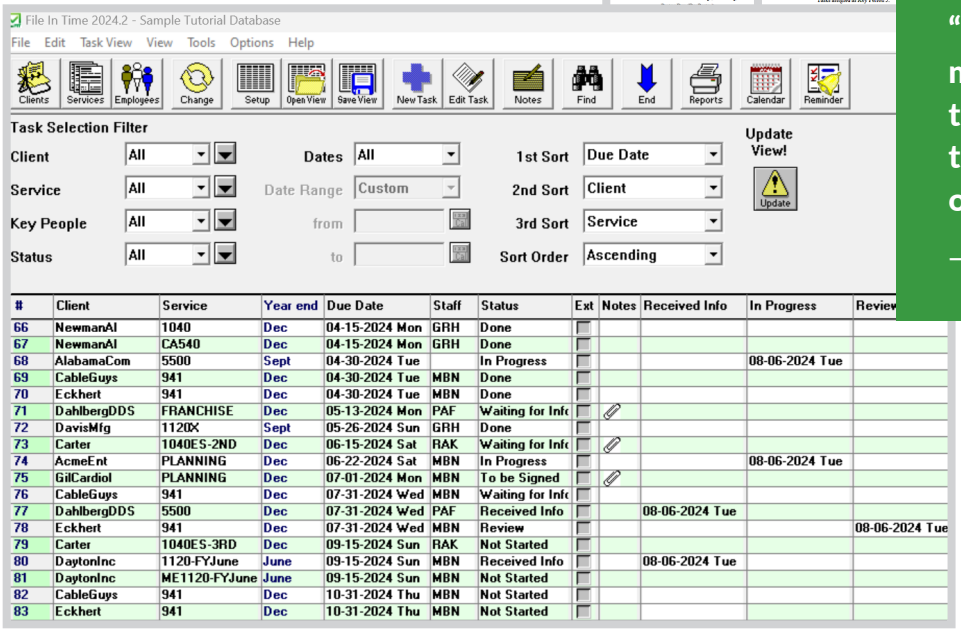
"I would not try to tackle what I do without File In Time. I recommend it to all my colleagues!"

- 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



#	Client	Service	Year end	Due Date	Staff	Status	Ext	Notes	Received Info	In Progress	Review
66	NewmanAl	1040	Dec	04-15-2024 Mon	GRH	Done					
67	NewmanAl	CA540	Dec	04-15-2024 Mon	GRH	Done					
68	AlabamaCom	5500	Sept	04-30-2024 Tue		In Progress				08-06-2024 Tue	
69	CableGuys	941	Dec	04-30-2024 Tue	MBN	Done					
70	Eckhert	941	Dec	04-30-2024 Tue	MBN	Done					
71	DahlbergDDS	FRANCHISE	Dec	05-13-2024 Mon	PAF	Waiting for Info					
72	DavisMfg	1120X	Sept	05-26-2024 Sun	GRH	Done					
73	Carter	1040ES-2ND	Dec	06-15-2024 Sat	RAK	Waiting for Info					
74	AcmeEnt	PLANNING	Dec	06-22-2024 Sat	MBN	In Progress				08-06-2024 Tue	
75	GilCardiol	PLANNING	Dec	07-01-2024 Mon	MBN	To be Signed					
76	CableGuys	941	Dec	07-31-2024 Wed	MBN	Waiting for Info					
77	DahlbergDDS	5500	Dec	07-31-2024 Wed	PAF	Received Info			08-06-2024 Tue		
78	Eckhert	941	Dec	07-31-2024 Wed	MBN	Review					08-06-2024 Tue
79	Carter	1040ES-3RD	Dec	09-15-2024 Sun	RAK	Not Started					
80	DaytonInc	1120-FYJune	June	09-15-2024 Sun	MBN	Received Info			08-06-2024 Tue		
81	DaytonInc	ME1120-FYJune	June	09-15-2024 Sun	MBN	Not Started					
82	CableGuys	941	Dec	10-31-2024 Thu	MBN	Not Started					
83	Eckhert	941	Dec	10-31-2024 Thu	MBN	Not Started					

File In Time System Requirements

Computer: 2 GHz or higher
Operating System: Windows 10 or higher and Windows Server 2016 or higher
(Citrix is being used successfully with no known issues in this environment)
Memory: At least 40MB RAM
Hard Disk Space: 50MB free disk space

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

- Accounting Today

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

All TimeValue Software products come with a one year money-back guarantee, so your purchase is risk free.

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