

Practice management considerations

Feature	Description
Overview	Bird's eye view to watch the firm at work, what work has been completed, what is in progress, what has not yet started
Add work	Schedule, describe and assign work to staff
Resources	Give staff instructions and resources to get their work done effectively
Recurrence	Define instructions on a task and set it to recur at a specified interval
Frequency	Manage multiple different recurring schedules - daily, weekly, weekdays, monthly, quarterly, annually, custom
Schedule	Calendar view of scheduled work to find gaps or crowding
Re-assignment	Re-assign work to other staff, one at a time or in batch
Integration	Sync time worked to invoices and / or payroll. Sync incoming email to staff work assignment list. Sync scheduled work to staff calendars.
Access	Secure, web-based access to work assignment and practice management tool, so that everyone can access it simultaneously
Permission levels	Multiple security levels for user permissions to workflow system
Batch update	To re-assign work, change status, and modify any other details related to many tasks...at once
Templates	Template checklists of how the firm performs the services it sells; they are used to easily schedule work assignments on new clients
Hold	Put a client's work on hold, as needed
Projects	Associate multiple tasks to a project, for project level reporting
Reports	Information on the performance of the firm at work used to steer the firm proactively

