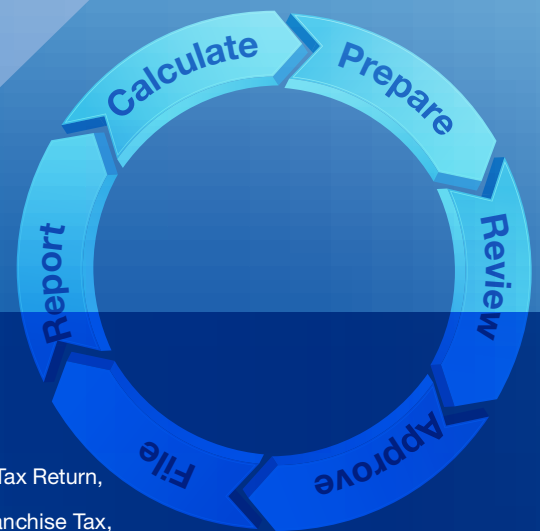


# AKORE<sup>®</sup> TaxCalendar

## THE ENTERPRISE TAX CALENDAR SOLUTION FOR CORPORATE TAX DEPARTMENTS

Used by Fortune 500 tax departments to automate their tax calendar scheduling, tracking, and reporting, AKORE<sup>®</sup> TaxCalendar was developed by tax professionals with over 25 years of Enterprise Tax Department experience.



### THE VERSATILE & POWERFUL SOLUTION

AKORE<sup>®</sup> TaxCalendar provides sophisticated functionality in an easy-to-use design that allows you to Capture, Generate, Schedule, Categorize, Report, Track and Manage, every aspect of any Tax Return, Business License or Obligation-- including Sales and Use Tax, Income Tax, Motor Fuels Tax, Franchise Tax, Business License, Property Tax, Annual Reports and many others.

TaxCalendar provides a fully-automated tool that enables effective management of tax returns, tax payments, filing extensions, amended returns, notices, and other important dates.

### MANAGE WORKFLOWS, DUE DATES & RISK

Manage staff workflow tasks, allocate returns & obligations, review workflow status updates, leverage extensive reporting and use dynamic Dashboard calendar views. AKORE<sup>®</sup> TaxCalendar provides Automated Due Date Monitoring and Tracking of Tax and Related Business Obligations in a multiyear, centralized database that installs on your Local Area Network.

Tax professionals are keenly aware that missing just one (1) deadline can mean thousands in interest and penalties. AKORE<sup>®</sup> TaxCalendar provides the due date logic, integrated rules and tools to minimize your risk.

**Call us today  
at 877.752.5673  
or email us at  
[sales@akoretax.com](mailto:sales@akoretax.com)  
[www.akoretax.com](http://www.akoretax.com)**

# AKORE® TaxCalendar

## AUTOMATED FEATURES & BENEFITS



### Save Time

- Advanced search engine functionality with customizable search criteria
- Reporting with built-in Microsoft Excel® style sort and filtering functionality
- View a report and with one (1) click it automatically opens a new email with the report attached, ready to send
- Double click on a Tax Return from a report and open it fast
- TaxTemplate automates the cumbersome spreadsheet process by providing more flexibility & more efficient use of tax resources
- Assign and manage TaxStaff workflow tasks with ease
- Manage multiple tax years
- Manage TaxStaff vacation schedules



### Minimize Risk

- Fully automated Dashboard with day, week, month and timeline views
- Pre-populated due dates and lead dates such as: Initiate and EFT lead days based on EOM, Weekend & Holiday rules
- Initiate payment date and EFT lead day setup, tracking and reporting
- TaxNotice Reports provides management with time sensitive data to act on quickly when needed
- Record and track all tax types: Sales & Use, GST/HST, VAT, Property, Income, Federal & much more
- Due-Date Alert Reminders



## AKORE® BUILT IN DOCUMENT MANAGEMENT SYSTEM

Using the AKORE® TaxCalendar easily create your own Electronic Filing Cabinet by attaching notes, preparation work papers, your filed, extended or amended return documents directly into the software with the simple to use built in Document Management System.

Become paperless by sharing, reviewing and editing any type of stored document at anytime from within the AKORE® TaxCalendar Software.

Advanced document searching features eliminate the need to browse through network and hard drives of tax folders looking for filed paperwork.

Easily attach return preparation instructions and notes directly to any tax return or template for quick and shared access.



## Easy to use & integrate with your systems

- Centralized database runs on MS-SQL® with desktop client running on XP-Pro®, Vista® or Windows7® easy setup & install
- Import functionality to upload your existing Tax Authorities & Tax Return templates
- Tax Analyst can have multiple Tax Returns opened at once with built-in window toggle automation
- Mass Filing, Deletion & Rollover functionality
- Microsoft Outlook® integration functionality
- TaxStaff user log-in custom tailored reports
- Export data to .pdf & .excel file formats



## Track & report with ease

- TaxReports provides more than 50+ Detail, Summary and Customizable Reports
- Plan, document, track and report on your groups and departments progress in meeting deadlines
- User defined fields -- which are also fully trackable and reportable
- Detailed TaxNotice Reports
- Advanced Search feature can also provide AD-HOC reports which can be easily exported to any file format
- Preloaded Forms Data



## NEED TO TRACK A RETURN NOTICE?

With AKORE® TaxCalendar you can start by simply scanning and then uploading the actual notice right into the AKORE® TaxCalendar Software.

Track any type of notice due date starting from the moment it's received and assigned till it's been resolved and closed.

Store any notes and also log all incoming and outgoing calls related to the notice you received using the AKORE® Notice Tracking and Resolution Features.

Using the built-in Notice Reports never let another notice due date slip through the cracks again.

*More product benefits continued on back...*

**Call us today at 877.752.5673 or email us at [sales@akoretax.com](mailto:sales@akoretax.com) or visit [www.akoretax.com](http://www.akoretax.com)**

## AKORE® TaxCalendar DASHBOARD

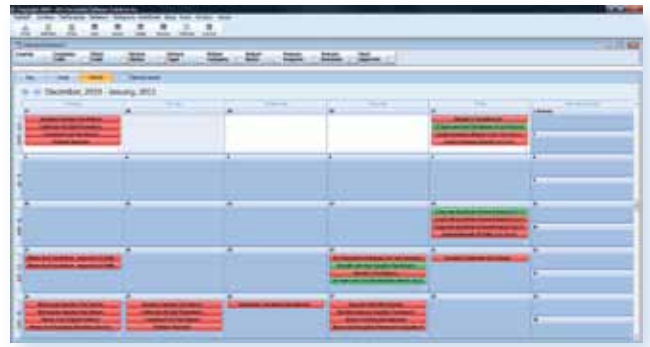
Have several staff members on your team and a large number of returns due on any given day between the 15th and 31st? Use the advanced AKORE® TaxCalendar DASHBOARD to show any of several views such as month, work week or daily view of a current return either filed or still needing to be filed.

Within the DASHBOARD quickly see the workflow details of any return. Is it "still being prepared", "Waiting for review" or maybe "Ready for Final Approval?"

No need to contact every tax staff member directly anymore. Save significant time and work more efficiently using the AKORE® TaxCalendar DASHBOARD to get your real-time return status.

Need to see what's due today just for you? Use the Built In Excel® style filters to filter the dashboard for just your returns, then change the calendar view to daily. Whether you have 5 or 50 returns due today they are now easy to manage.

Using the DASHBOARD view, you can choose to drill into any return, attach documents or even file the return if you need to. No more switching back and forth between your spreadsheets and Microsoft Outlook®



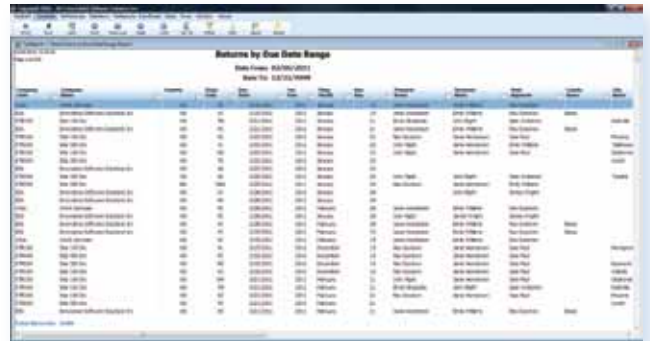
## AKORE® REPORTS

No other Tax Calendar software can provide you with the power and ease of use that comes built into all AKORE® TaxCalendar Reports.

Experience the built-in Microsoft Excel® filters you're already familiar with. Don't want to have to "Build Your Own Report" inside someone else's software? With AKORE® TaxCalendar you don't have to, we have all the reports you'll need. Find something we don't have? No problem, we will add it for you.

Every report is integrated and attached directly into email.

With a simple click, send the report to any user in either a Microsoft Excel® or Adobe® PDF format.



**Call us today at 877-752-5673 or email us at [sales@akoretax.com](mailto:sales@akoretax.com) for more information or to setup a live demonstration and see why more Corporate Tax Departments are choosing AKORE TaxCalendar.**

Innovative Software Solutions, Inc., creator and owner of the AKORE® TaxCalendar software was established in 1993 and has been providing advanced commercial and custom Tax software to satisfied customers for more than 17 years.

Businesses depend on AKORE® TaxCalendar to deliver world class functionality and reliability to the Enterprise Tax Department.

