

# AKORE® TaxCalendar™



## THE CLOUD-BASED TAX CALENDAR AND DUE-DATE TRACKING SOLUTION FOR TAX DEPARTMENTS

Used By Fortune 500 Tax Departments To Automate Their Tax  
Calendar Scheduling, Tracking, And Reporting.

Akore® Taxcalendar Was Developed By Tax Professionals

With Over 25 Years Of Enterprise Tax Department Experience.

**Call Us Today**  
**at 877.752.5673**  
**Or Email Us At**  
**[sales@akore.com](mailto:sales@akore.com)**  
**[www.akoretax.com](http://www.akoretax.com)**

# Why AKORE® TaxCalendar™ ?



## RISK

### Manage Workflows, Due Dates & Risk

- Manage staff and client workflow tasks with built-in email workflow status notifications.
- Create workflows quickly using built-in and custom created templates.
- Assign Preparers, Reviewers and Final Approvers using templates and mass update tools.
- Automatically calculates due dates based on weekend rules, holidays, etc.
- Several real time customizable due date tracking dashboards using cloud technology.
- Due Date Tracking Alerts that provide both online and automated email notifications.
- Easy to use Microsoft Excel© style Reports with customizable layouts, sorting and filtering.

### Designed to handle any Type of Obligation or Event

- Use the built-in return types or quickly create your own.
- Frequencies like Monthly, Quarterly, Annual, etc. are handled by the software automatically.
- Fully automated Calendar Style Dashboard with day, week, month and timeline views.
- Excel© style color coded Dashboard with Real-time updating.
- Handle Change using the powerful built-in Mass Filing and Changes tools.
- Rollover tools are built for every Frequency, they are powerful yet simple to use.
- User Defined fields which can be used for mass editing, searching, tracking and reporting.

### 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. Scan your Postal receipts for secure documentation of filing.



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

# Why AKORE® TaxCalendar™ ?



## RISK

## Cloud based Real-time Akore® TaxCalendar™ Dashboards

### ■ Microsoft® Outlook® Style

Start using the Akore® Calendar Dashboard today and overcome all the challenges, headaches and struggles associated with tracking events and due dates for multiple tax staff that could be located globally.

### ■ Color Coded Excel® Style

Supervisors and those that manage and track event due dates on a monthly or even daily basis will use this color-coded Dashboard to quickly see all statuses across all Tax Types in one glance.

### ■ Analytics and Executive Reports

Executives, VPs, and Managers will have the high-level reports they have been asking for. Using Real-time cloud technology guarantees all reports will always be updated and accurate.



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# Why AKORE® TaxCalendar™ ?



## Encrypted and Secure Akore® Cloud Access

- Secure dedicated hosting built using Rackspace Technology.
- Data Encryption comes standard for every Akore® Cloud Customer.
- Get Ready to securely access your Dashboards, Due Dates and Manage Workflow Task, Real-Time from any location in the globe.

## Capture and Process Payments

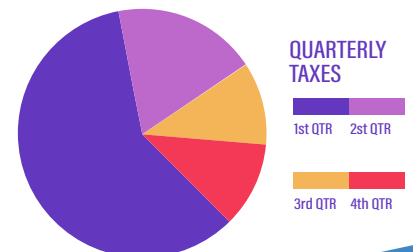
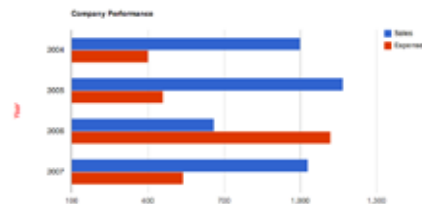
- Use the built-in Payments module to record Tax Payments. Includes built-in payments workflow.
- Import payments directly from external Tax Systems such as Vertex®, Corptax® and others.
- Link Filing Status with externally prepared returns for advanced tracking and reporting.
- Export Tax Return data into BI reporting compatible data files.

## Ready to Use Customizable & Personalized Standard Reports

- Standard Reports provide more than 50+ Detail, Summary and Customizable Reports
- Advanced Search feature can also provide AD-HOC reports which can be easily exported to any file format
- Users have the ability to customize standard report layouts and views

## Reports Generator

- Build custom reports and search tools, save and share customized reports
- Using any custom report, you can filter, search and mass change your data



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