

Eliminate Tax Season Headaches in 2023 with **Practice Management Software**



January 1 marks the beginning of tax season—a time dreaded by many accountants due to its high-pressure workload, complete with 12+ hour days and weekends spent at the office. But it doesn't have to be that way.

With the right practice management software, you can simplify your workflows, reduce non-billable hours, and spend more time with friends and family.

Key features of practice management software include:

1 Project management

Cut down on tedious or non-billable administrative tasks by streamlining your workflows—and focusing on the work that really matters.

- Create repeatable task templates
- Delegate tasks with clear steps and deadlines
- Stay updated on the status of projects



2 Document management

Swap the paper filing system for document management software so you can spend less time searching for misplaced 1099s or Schedule K-1s.

- Automate tedious tasks like printing and binding tax returns
- Organize files in customizable folder templates
- Preview documents instead of downloading them to (potentially unsecured) hard drives



3 Client portal

Timely communication with your clients is critical. With a client portal, you don't need to worry about missed communications sitting in a flooded inbox.

- Use a centralized storage location with unlimited storage
- Upload relevant documents for easy client access
- Answer your clients' questions as they come up



4 File-sharing and eSignature

Cut down on back-and-forth emailing with file-sharing and eSignature software, complete with bank-level security.

- Securely share and access files from anywhere
- Keep client communications and files all in one secure location
- Obtain legally binding eSignatures in just a few clicks

5 Time tracking and billing

Ensure profitable pricing and budgets for projects. Accountants can be at risk of burnout during tax season, so use time tracking and billing software to:

- Log the amount of time each project takes your firm to complete
- Create a billing structure that's profitable for your team
- Make appropriate staffing decisions so your team isn't overworked



Tackle tax season with **Mango**

Mango Practice Management was made by accountants, for accountants. We understand the struggles of tax season, so we've developed smart solutions for your everyday needs.

Ready to start the year out strong? [Schedule a demo](#) today.