

TrakDate

Task Monitoring/Due Date Tracking



- **Pre-defined master tasks** — annual fiscal or calendar year, quarterly fiscal or calendar year, monthly
- **Automatic Due Dates, including extensions** — based on fiscal year of entity
- **Ad-hoc tasks** — for one time project specific tasks
- **Easy check-off** — change status from not started to in process to complete
- **Assign tasks to staff members**
- **Tasks grid** — can be filtered, then sorted and sub-totaled by "drag and drop" on column headings. Data can also be exported to Excel.
- **Data filters** — by due-date range, tasks, management, assigned to, status, client/project
- **Flag tasks as recurring** — allows automatic roll-forward to next year.
- **Fully integrated** — uses TCentral clients and projects - no data duplication

TrakDate (Tasks & Due Dates)

Utilities Options

Display Options: Counts Total Columns One & Two Export Mode Refresh Set Filters Print Help

Task	Name	YE	Due Date	Task Label	AsgnTo	Status	Last Date	Mgt-1	Mgt-2	Ext#	Year
Total		38									
1040		9									
1040	Country Estates	2									
1040	Country Estates	12	04/15/2005	Edward & Marleen McDougal	HHM	In Process	03/30/2005	WIN	SAS	0	2004
1040	Country Estates	12	04/15/2005	Peter & Jean Cochran		Not Started		WIN	SAS	0	2004
1040	Denton Fender Auto Body	3									
1040	Denton Fender Auto Body	12	04/15/2005	Charlie and Sally Denton	CLI	In Process	04/06/2005	WIN	SAS	0	2004
1040	Denton Fender Auto Body	12	04/15/2005	Johnny Kraft	EMM	In Process	04/04/2005	WIN	SAS	0	2004
1040	Denton Fender Auto Body	12	04/15/2005	Robert & Elizabeth Jones	EMM	Not Started		WIN	SAS	0	2004
1040	Fresh Painters Co./Tax Ser	2									
1040	Fresh Painters Co./Tax Services	12	04/15/2005	Andrea Bingham	JFE	In Process	04/08/2005	CLI	EMM	0	2004
1040	Fresh Painters Co./Tax Services	12	04/15/2005	Sally Thomas	HHM	Not Started		CLI	EMM	0	2004
1040	Pacific Records	2									
1040	Pacific Records	12	04/15/2005	Sam Goody - PTR	JFE	In Process	03/31/2005	WIN	SAS	0	2004
1040	Pacific Records	12	04/15/2005	Susan Ardmore	EMM	Not Started		WIN	SAS	0	2004
1040ES-QTR		12									
1041		1									
1065		3									
1099		1									
1120		1									
5500		1									
706		1									
941-QTRLY		8									
AD-HOC		1									

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