



Powerful tools to streamline your entire workflow

Digita Practice Management Solutions

Many accountancy practices face the challenge of managing hundreds of staff and client job tasks on a daily basis. Like all firms, you want to manage your day-to-day activities with ease and have peace of mind that the right people are working on the right tasks at all times.

Whether you need simple workflow management or more advanced functionality, our scalable solutions help you and your team track progress, meet deadlines and invoice clients. Take a look at the chart below to see the key functionality of each product at a glance and assess which suits your needs.

Key features	Standard	Advanced
Customisable client dashboard	●	●
Practice and productivity reports	●	●
Project and task creation	●	●
Resource tracking against projects	●	●
Manual project/task assignment to staff	●	●
Job and task reporting	●	●
Time and billing reports	●	●
WIP line item adjustment	●	●
Client invoice creation	●	●
Reoccurring billing	●	●
Statement creation	●	●
Receipt and adjustments entry	●	●
User-defined fields	●	●
Data mining on standard fields	●	

Key features	Standard	Advanced
Client engagement mail merge	●	
Calendar time entry	●	
Daily, weekly, monthly, and periodic projects		●
Automatic project/task assignment to staff		●
Drag and drop work in staff calendars		●
Work queue for unassigned tasks		●
Notifications of due tasks		●
Workflow timers		●
Batch invoice creation		●
Outlook® integration		●
Mobile app		●

Contact us to arrange a demonstration with one of our experts.

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