



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	Key features	Standard	Advanced
Customisable client dashboard	✓	✓	Data mining on standard fields	✓	-
Practice and productivity reports	✓	✓	Client engagement mail merge	✓	-
Project and task creation	✓	✓	Calendar time entry	✓	-
Resource tracking against projects	✓	✓	Daily, weekly, monthly and periodic projects	-	✓
Manual project/task assignment to staff	✓	✓	Automatic project/task assignment to staff	-	✓
Job and task reporting	✓	✓	Drag and drop work in staff calendars	-	✓
Time and billing reports	✓	✓	Work queue for unassigned tasks	-	✓
WIP line item adjustment	✓	✓	Notifications of due tasks	-	✓
Client invoice creation	✓	✓	Workflow timers	-	✓
Reoccurring billing	✓	✓	Batch invoice creation	-	✓
Statement creation	✓	✓	Outlook® integration	-	✓
Receipt and adjustments entry	✓	✓	Mobile app	-	✓
User-defined fields	✓	✓			

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

03450 180 907  
[tax.thomsonreuters.co.uk/info](http://tax.thomsonreuters.co.uk/info)  
[digita.info@thomsonreuters.com](mailto:digita.info@thomsonreuters.com)

The intelligence, technology  
and human expertise you need  
to find trusted answers.



the answer company™  
**THOMSON REUTERS®**