

## Task-based Scheduling for Tax & CAS

So the whole firm can schedule smarter, balance utilization and predict performance.

Other scheduling tools in the market are either industry-agnostic, or built for audit.

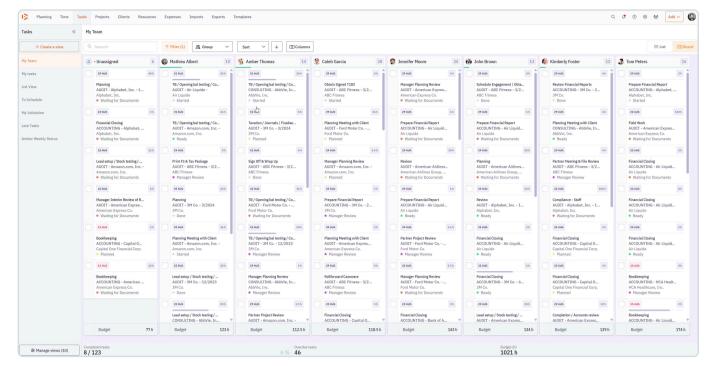
They work for long audit engagements but are unfit for Tax and CAS teams that handle short, deadline-driven jobs.

Beeye is built around the Tax & CAS reality. And because it also works for audit and advisory, it becomes the single way to manage workloads and engagements across the firm.

## One software, three ways to plan work

Different teams think about work differently. Beeye gives each team the view they need — while leadership gets one, consistent picture of capacity and performance.

1. Board view – built for Tax & CAS reality



Work such as tax returns and monthly bookkeeping don't need to be booked on specific days — they just need to be done by the deadline.

Beeye's Kanban/Board view is designed for that:

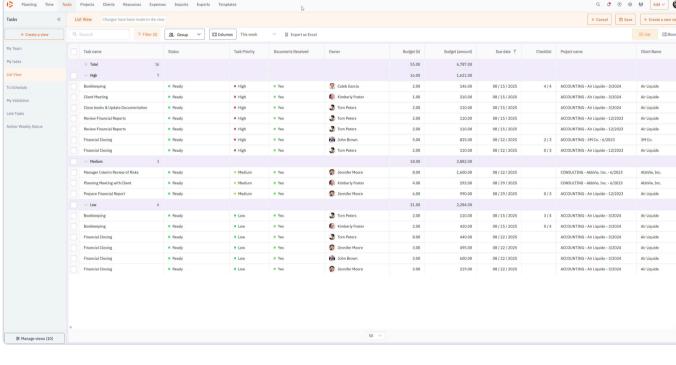
- See all tasks assigned to each person and compare utilization
- b Drag and drop tasks to balance workloads in seconds
- Quickly clear unallocated work pools and assign remaining tasks
- Use AI matching to automatically suggest the best person for each job based on skills, availability and budget

Work delivered on time and to budget without overloading the team.

workflow into resource management.

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2. List view – where workflow meets scheduling



Tasks and budgets flow straight into Beeye – no re-keying or manual imports

Beeye plugs into your existing workflow systems such as CCH and XCM. The list view is one way to turn that

Work can be allocated as soon as client papers arrive – actionable work doesn't sit without an owner

3. Calendar & Gantt – control plans and profits for long engagements

Faster client turnaround and more time spent on billable work instead of scheduling.

Beeye's AI can automatically assign tasks to the most suitable, available team member



Quickly adjust timelines and allocations as things change

Fewer surprises, smoother busy seasons, and tight control of audit margins.

The perfect blend of autonomy and control

Operationally, each service line can use the scheduling view that works best for them – Calendar, Board or List –

Firm-wide utilization and capacity visibility

while enabling firm-wide resource management consistency.

Because Beeye integrates with your practice management and workflow tools across teams, the firm gets, in one system:

The ability to share resources across teams to deliver more work without adding headcount

Predict engagement profitability and adjust schedules accordingly

Tax & CAS: a scheduling tool that matches how these teams work

Why firms choose Beeye

- Audit-ready: robust enough for complex audit and advisory engagements
- One unified way to manage workloads and engagements across the whole firm

  Real-time visibility for leaders, without extra manual reporting
- allocate work, find hidden capacity, and grow profitably.

We're trusted by several of the IPA Top 150, which means your competitors are getting ahead of you.

Beeye is the product of choice for Tax and CAS – and the right solution for firms that want one unified way to



JohnsonLambert Cpas + consultants

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Don't get left behind! Contact Jim Keenan at jim.keenan@mybeeye.com for a tailored discussion and demo.