



# 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.

Beeeye 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. Beeeye 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.

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

- See all tasks assigned to each person and compare utilization
- 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.

### 2. List view – where workflow meets scheduling

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

- Tasks and budgets flow straight into Beeeye – no re-keying or manual imports
- Beeeye's AI can automatically assign tasks to the most suitable, available team member
- Work can be allocated as soon as client papers arrive – actionable work doesn't sit without an owner

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

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

Beeeye's calendar and Gantt views give managers a clear, time-based picture of engagements:

- Allocate work and easily visualize gaps and clashes
- Forecast capacity and deal with double-bookings
- 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 – while enabling firm-wide resource management consistency.

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

- Firm-wide utilization and capacity visibility
- The ability to share resources across teams to deliver more work without adding headcount
- Predict engagement profitability and adjust schedules accordingly

## Why firms choose Beeeye

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

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