



Enhance your practice with

WorkXFlow Planner,

now certified by

XPM

and **Senta**

With WorkXFlow, see results:

- Elimination of the planning chaos.
- Increased efficiency from optimized planning.
- Time savings from otherwise complex planning.

In three simple steps:

1. Connect WorkXFlow to your Practice Manager software seamlessly.
2. Visualize all jobs and create the optimum plan.
3. Plan out the workload with greater clarity.

WorkXFlow Planner is a tool designed specifically to plan out your jobs & tasks with ease to maximize productivity and profits. WorkXflow planner ensures you will no longer have missed deadlines, frustrated customers or under/over utilization of your staff.

Sign up with
XERO



Sign up today



Why WorkXFlow? Our key features:

Auto-Planner: Our AI-driven auto-planning feature enables intelligent optimization of your accounting tasks.

Integration: Seamlessly integrates with Xero Practice Manager and Senta.

Calendar-view: Plan using user-friendly drag-and-drop interface.

Insights: Obtain real-time insights to drive decision-making.



Explore all our features



Configurable planning horizon:

Plan on daily, weekly, monthly or annual basis



Split jobs:

Assign jobs between multiple employees



Unplanned work queue:

Pre-planning workspace for wider visibility



Filters:

Multi-faceted job, task and client-based filter options



Detailed job & task drilldown:

Detailed job and task information



Batch planning:

Plan recurring and fixed jobs



Job readiness checklist:

Checklist to identify "planning ready" jobs



Secure data handling:

Enhanced security to protect your data

[Book a Free Demo](#)

Contact us now:



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WorkXFlow

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Partner



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["WorkXFlow Planner: A planning tool for your accounting practice"](#)