



Collaborative work management

Y	←	2023	→	2023													
M	←	June	→	June													
W	←	W22-S26	→	W 22					W 23					W 24			
D	←	1-30	→	1	2	3	4	5	6	7	8	9	10	11	12	13	14
		Calvin Steward Partner	180 H	Iselectrics 8 H / D				General Motors 8 H / D				Opentech					
		Eduardo Lindsley Manager	176 H	General Motors 8 H / D				General Motors 8 H / D				Zoomit					
		Pat Alexander Senior	176 H	Acme, Inc. 8 H / D				Acme, Inc. 8 H / D									

National Research Council Canada

Microsoft for Startups

Certified
B
Corporation

Dianne Russell

19 FEB

Monthly Bookkeeping
Accounting 2023

Bioplex
Ongoing

19 FEB

Monthly Bookkeeping
Accounting 2023

Rangreen
Ongoing



Beeye is already present in **many countries** and expanding quickly

Staff

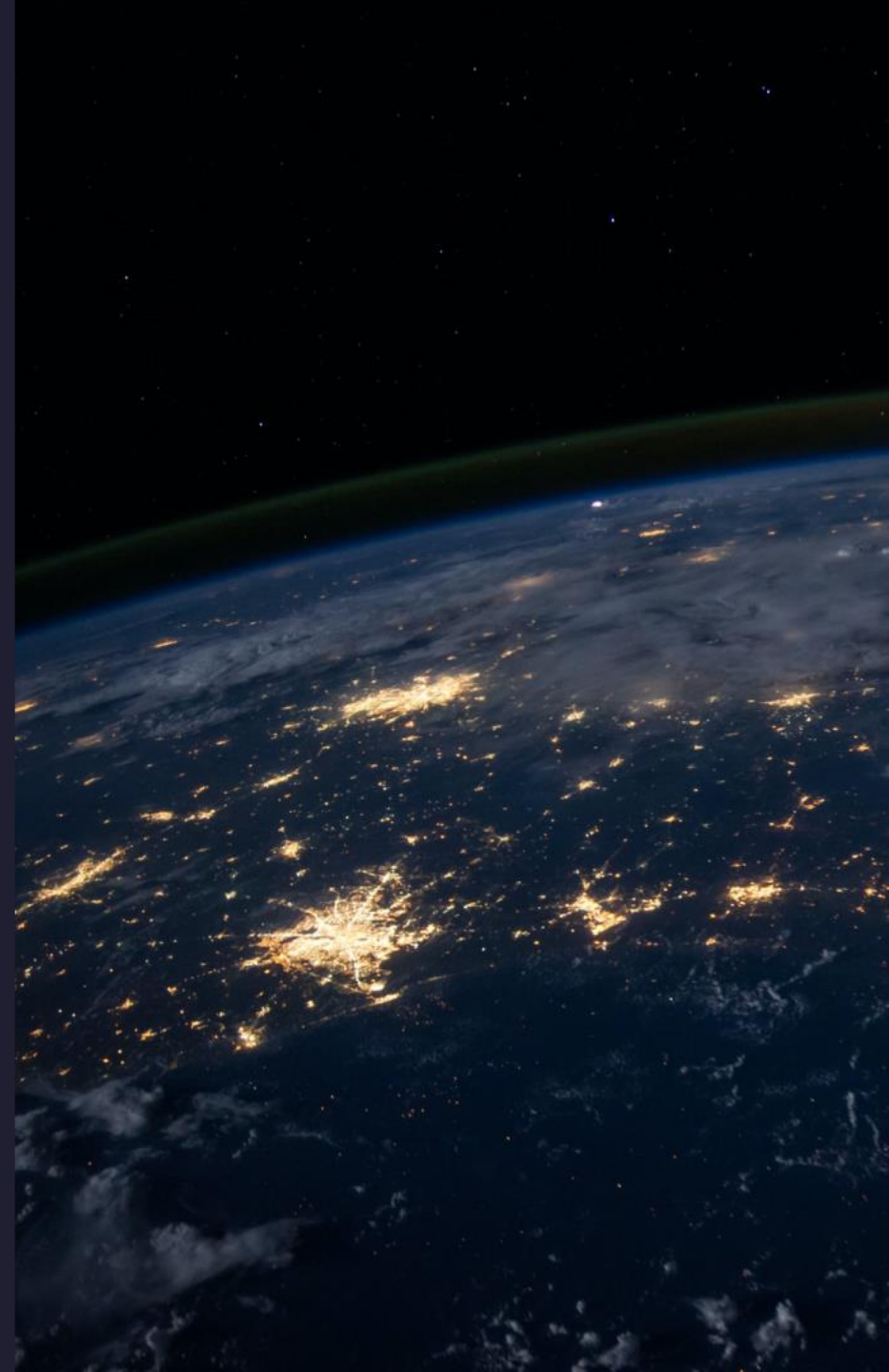
Canada
France
Dubai
Madagascar

Investors

United Kingdom
Canada
France
USA
China
Dubai

Clients

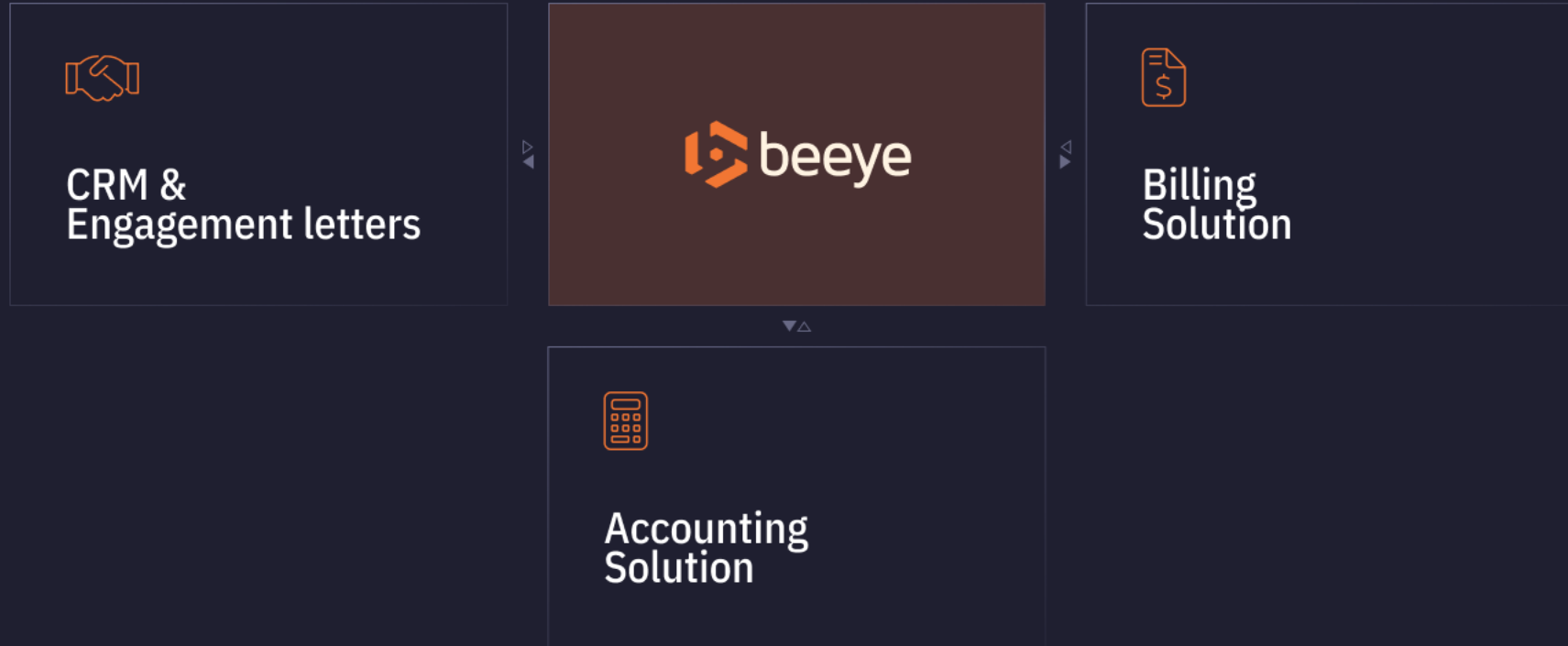
France
United Kingdom
Canada
Luxembourg
Belgium
Morocco





Your Software Ecosystem

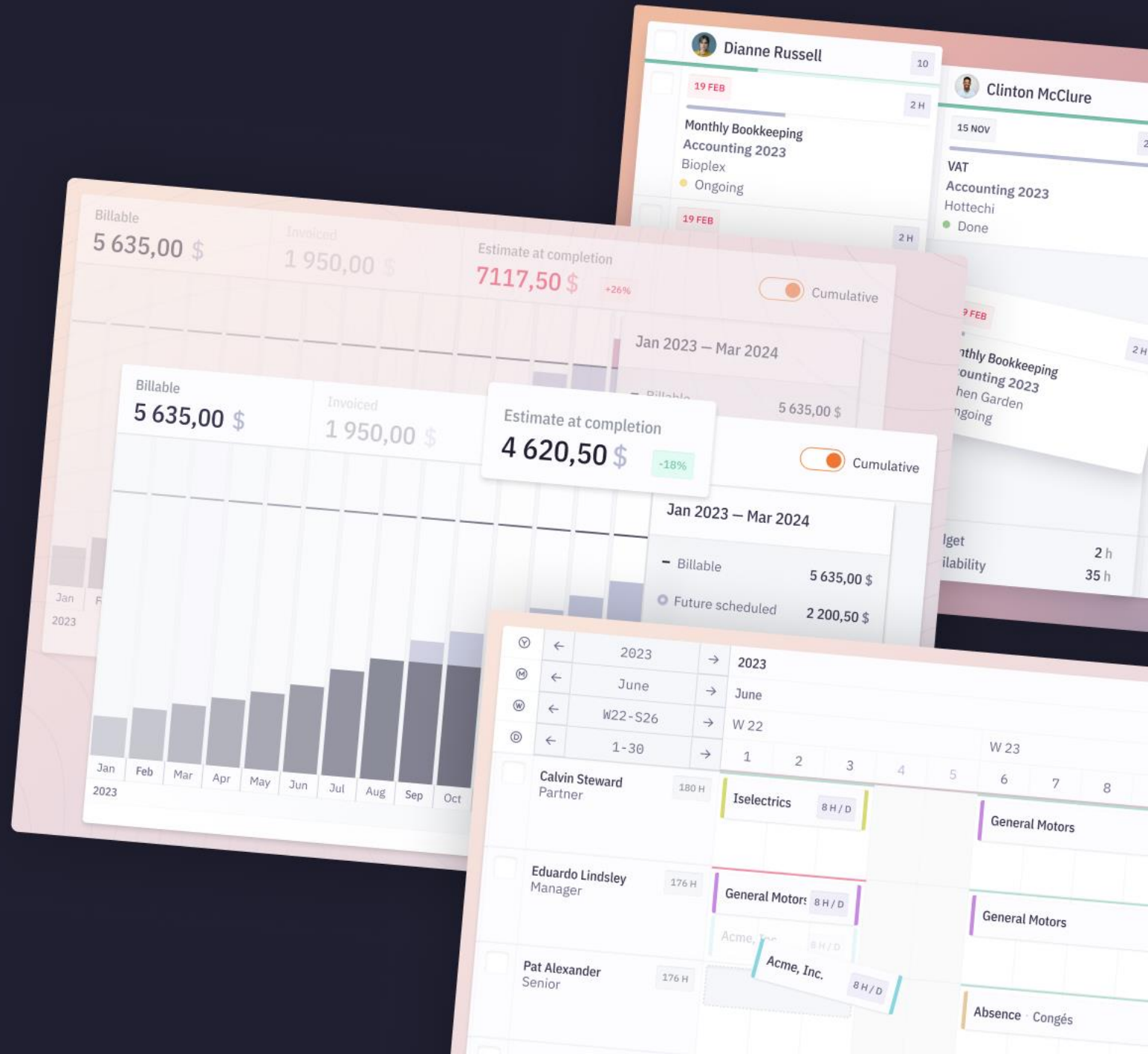
Beeye is at the heart of your ecosystem, connecting to your existing solutions through APIs to avoid multiple data entry.



Who do we help?

The ideal solution
for both
managers &
employees within
all your teams

Accounting
Audit
Bookkeeping
Consulting
Tax & Compliance
And more...



How do we help firms like yours?

With the help of the Canadian government's research council, we've developed an algorithm based on **AI** to **assign** the **right task** to the **right person** at the **right time**



I finished scheduling all projects for next year for your 1500 clients. I scheduled 178 557 tasks and assigned them to the 225 team members in 0.56s.

[Check schedule →](#)



 **Gabrielle** just joined the team to replace  **Didier** while he is on sick leave.
I reassigned her the most urgent tasks and spread the other ones over the rest of the team.

[See details →](#)



I reorganized  **Marie-Noëlle's** schedule to ensure her well-being and guarantee project **Groovestreet 2023** stays on track.

[See schedule →](#) [Book 1:1 meeting →](#)



National Research
Council Canada



Azure Machine Learning

For modern accounting firms, proper scheduling has become a weapon of choice in a fight against employee turnover that negatively impacts their growth.

But they often lack the tools and resources to execute that task.



Tools

- Non-connected
No sharing of information
- Manual
Repetitive tasks
- Time consuming
Several minutes / task scheduled
- Obsolete
Simplistic paper- or Excel-based processes



Resources

- Insufficient
Need several FTEs but rarely any
- Not specialized
No employees dedicated to scheduling
- Overworked
No time to dedicate to scheduling



Consequences



Overworked employees

75%



High employee turnover

30%



Late tasks

3 / 4



New clients turned down

10/mo

Based on a 4 minute per task estimate, the initial schedule for a year of work adds up to over 3000 h of work...

... often done by billable resources instead of taking on new billable projects.



A typical firm

50 employees

1000—2000 clients

50 000+ tasks scheduled / year

4 min / task

3000+ hours to produce schedule
More than 1.5 FTE



...but it gets worse !

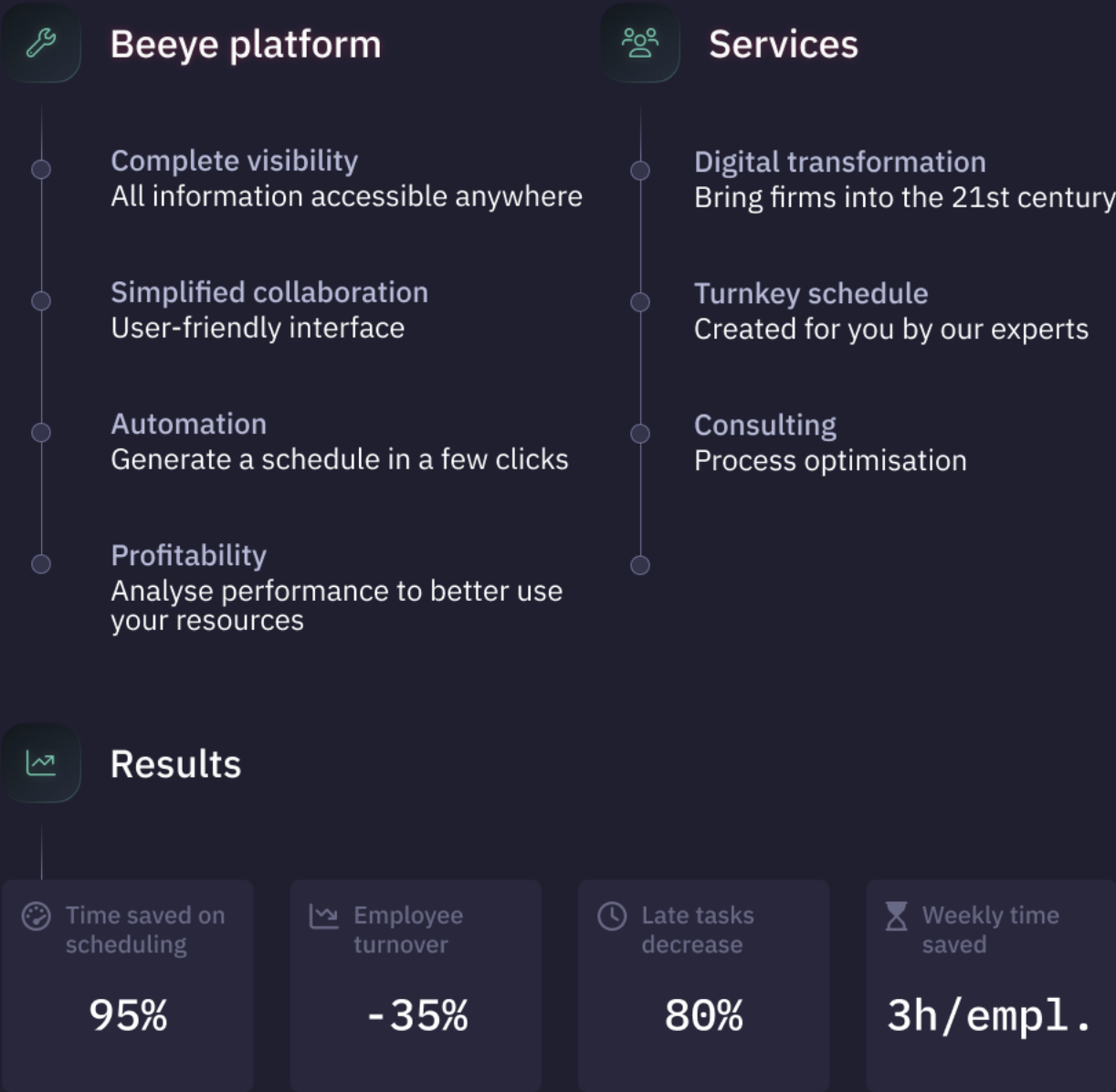
Larger companies
Hundreds of thousands of tasks.

Tools slow down scheduling (5+ min / task)
Complex access to the necessary information slows down the scheduling process.

Low quality schedule
Schedule must be modified or entirely redone several times to take changes into account.

For a firm dealing with 5000 clients per year, taking 5 min / task, and rescheduling 50% of tasks, up to 20 FTE could be required.

We created an automated and collaborative task scheduling tool centered on employee experience to help accounting firms retain talent and increase productivity.



The ideal tool for scheduling, managing and analyzing the tasks of a modern firm.



Resource availability management



Scheduling automation



Smart project templates



Skills & interests management



Predictive profitability analysis



Real-time visibility



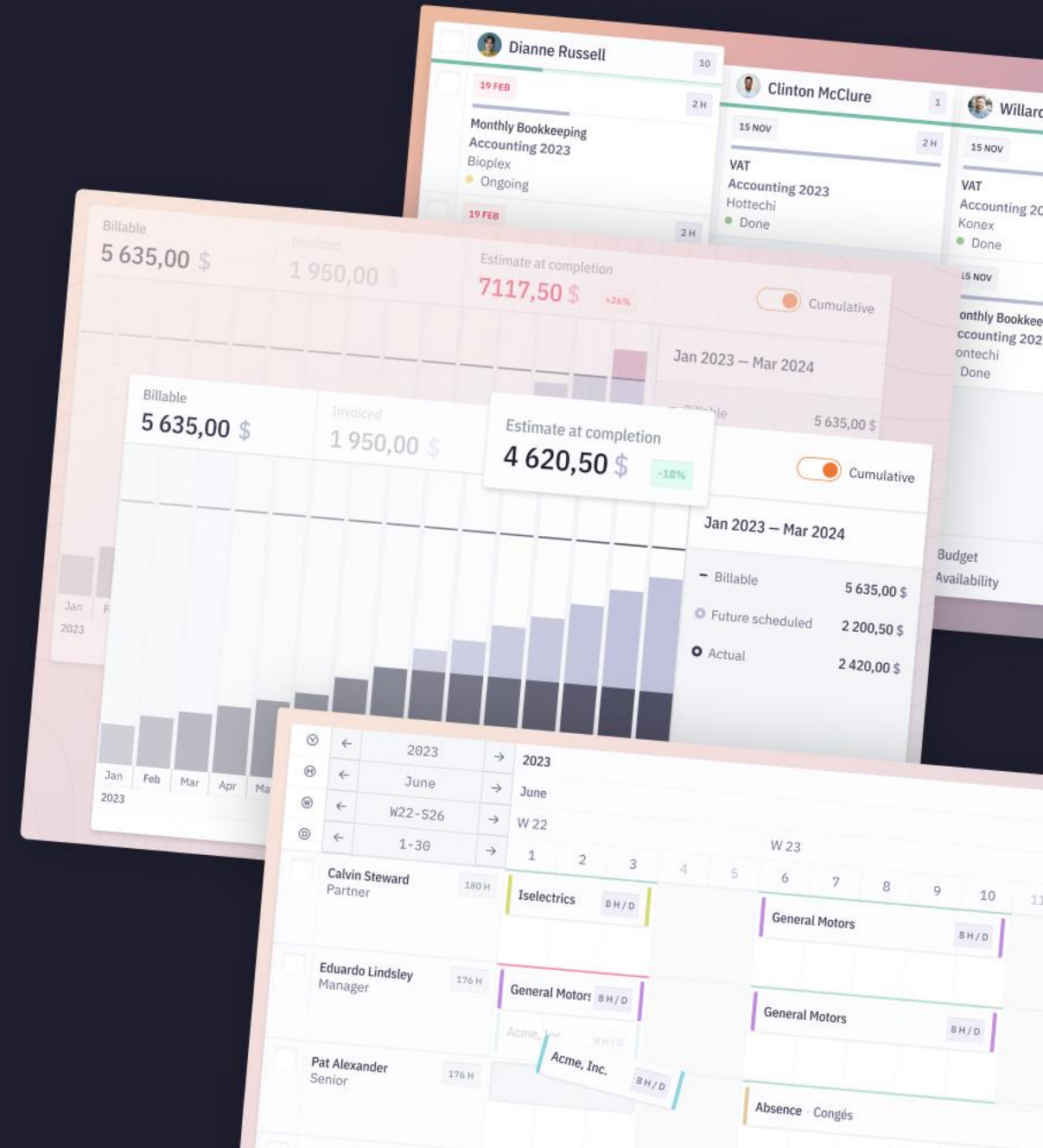
Collaboration



Data centralization



Process harmonization



Schedule

Time & Expenses

Tasks

Projects

Clients

Team

Templates

Clients

<<

Search

Filter

Group

Sort

▼

↓

Columns

+ Create view

All clients

My prospects

My consulting clients

My tax clients

My audit clients

My accounting clients

Name

Schneider Electric

Vinci

Vivendi

Michelin

Cirque du Soleil

Carrefour

Total

Groupe Auchan

Bombardier

Legrand

Fnac

Accountant

Martine Azaïs

Laurine Bourdon

Laurine Bourdon

Edgar Barthet

Edgar Barthet

Edgar Barthet

Edgar Barthet

Edgar Barthet

Edgar Barthet

Edgar Barthet

Edgar Barthet

Edgar Barthet

Engagement manager

bill.sanders@example.com

kenzi.lawson@example.com

kenzi.lawson@example.com

jackson.graham@example.com

jackson.graham@example.com

jackson.graham@example.com

jackson.graham@example.com

jackson.graham@example.com

jackson.graham@example.com

jackson.graham@example.com

jackson.graham@example.com

jackson.graham@example.com

Manage views (12)



DATA IMPORT



Easily synchronize all your important data

Directly import data from provided Excel templates

Batch-update client, resource and project data

Use custom fields to define and access your own meta-data

+ Create view

All clients

My prospects

My clients

My tax clients

My auditing clients

My accounting clients

Assistant

Actif

Actif

Actif

Actif

 Active

100

100

 ACT

 Schedule Time & Expenses Tasks Projects Clients Team Templates					
Templates	 Settings  Clone  Create task	Basic	 	Advanced	
 Create template	Send Client Tasks	Complete preliminary review			
Audit	Schedule Meeting	 Description			
Bookkeeping	Client Kick-Off	Enter standard operating procedure description here			
Client Management	Request Documents				
Client Onboarding	Internal Planning Meeting	 Team Jane Cooper			
Consulting	Review & Sign-off Audit Plan	 Scheduling			
Onboarding Team Member	Complete preliminary review	 Due Date			
Payroll	Prep for Phase 1 testing	 Time Budget 5 h			
Sales & Marketing	Complete Phase 1 testing	 Checklist			
Systems Setup	On-site testing	☐ Roll forward binder			
Tax & Compliance	Complete Phase 2 testing	☐ Import TB  			
	Take corrective actions	☐ Group accounts			
	Audit review meeting	☐ Update FS			
		☐ Update PBC list			
		☐ Complete workpapers			
		 Add			



SMART TEMPLATES



Structure work with smart templates

Standardize, organize and streamline work to get it ready for scheduling

Include business rules, due dates, time budgets and operating procedures

Tailor teams and budgets for each client with scenarios

Import from CRM & Proposal Management software

Schedule

Time & Expenses

Tasks

Projects

Clients

Team

Templates

Add

Templates

+ Create template

Settings

Clone

Create task

Basic

Advanced

+ Add scenario

Audit

Bookkeeping

Client Management

Client Onboarding

Consulting

Onboarding Team Member

Payroll

Sales & Marketing

Systems Setup

Tax & Compliance

Send Client Tasks

Schedule Meeting

Client Kick-Off

Request Documents

Internal Planning Meeting

Review & Sign-off Audit Plan

Complete preliminary review

Prep for Phase 1 testing

Complete Phase 1 testing

On-site testing

Complete Phase 2 testing

Take corrective actions

Audit review meeting

Complete preliminary review

Description

Enter standard operating procedure description here.

Team Jane Cooper

Scheduling

Due Date

Time Budget 5 h

Checklist

Roll forward binder

Import TB

Group accounts

Update FS

Update PBC list

Complete workpapers

+ Add

		Schedule	Time & Expenses	Tasks	Projects	Clients	Team	Templates	
Audit 2023 General Motors 01 / 09 / 2023 → 30 / 06 / 2024 Jane Cooper Accountant Information Fees Tasks Expenses Invoices Files Export Settings		Schedule Select all 15 OCT0.25 H Send Client Tasks Cody Fisher Planned 15 OCT1 H Client Kick-Off Cody Fisher Planned 16 OCT0.25 H Request Documents Cody Fisher Planned 20 OCT4 H Internal Planning Meeting Jane Cooper Planned 30 OCT4 H Review & Sign-off Audit Plan Guy Hawkins Planned 31 NOV16 H Complete preliminary review Guy Hawkins Planned 15 DEC4 H Prep for Phase 1 testing Jane Cooper Planned 31 DEC15 H Complete Phase 1 testing Jane Cooper		Complete preliminary review Description Enter standard operating procedure description here. Team Guy Hawkins Scheduling Due Date Time Budget 5 h Checklist Roll forward binder Import TB Group accounts Update FS Update PBC list Complete workpapers + Add					
Edit Close		Budget155 h		Estimate at completion (h)0 h				Fees15	



PROJECT SETUP



Check & adjust project settings if needed



Tweak project team



Adjust budgets



Add / remove tasks

**Let Beeye schedule
your project for you**



Schedule a whole project
in one click

Define scheduling constraints and buffers

Minimize overutilization

Audit 2023

General Motors

01 / 09 / 2023 → 30 / 06 / 2024

Jane Cooper

Associée

Information

Fees

Tasks

Expenses

Invoices

Files

Export

Settings

Schedule

Select all

15 OCT

0.25 H

Send Client Tasks

Cody Fisher

Planned

15 OCT

1 H

Client Kick-Off

Cody Fisher

Planned

16 OCT

0.25 H

Request Documents

Cody Fisher

Planned

20 OCT

4 H

Internal Planning Meeting

Jane Cooper

Planned

30 OCT

4 H

Review & Sign-off Audit Plan

Guy Hawkins

Planned

31 NOV

16 H

Complete preliminary review

Guy Hawkins

Planned

15 DEC

4 H

Prep for Phase 1 testing

Jane Cooper

Planned

31 DEC

15 H

Complete Phase 1 testing

Jane Cooper

Planned

Complete preliminary review

Description

Enter standard operating procedure description here.

Team

Guy Hawkins

Scheduling

Due Date

Time Budget

5 h

Checklist

Roll forward binder

Import TB

Group accounts

Update FS

Update PBC list

Complete workpapers

+ Add

Edit

Close

Budget

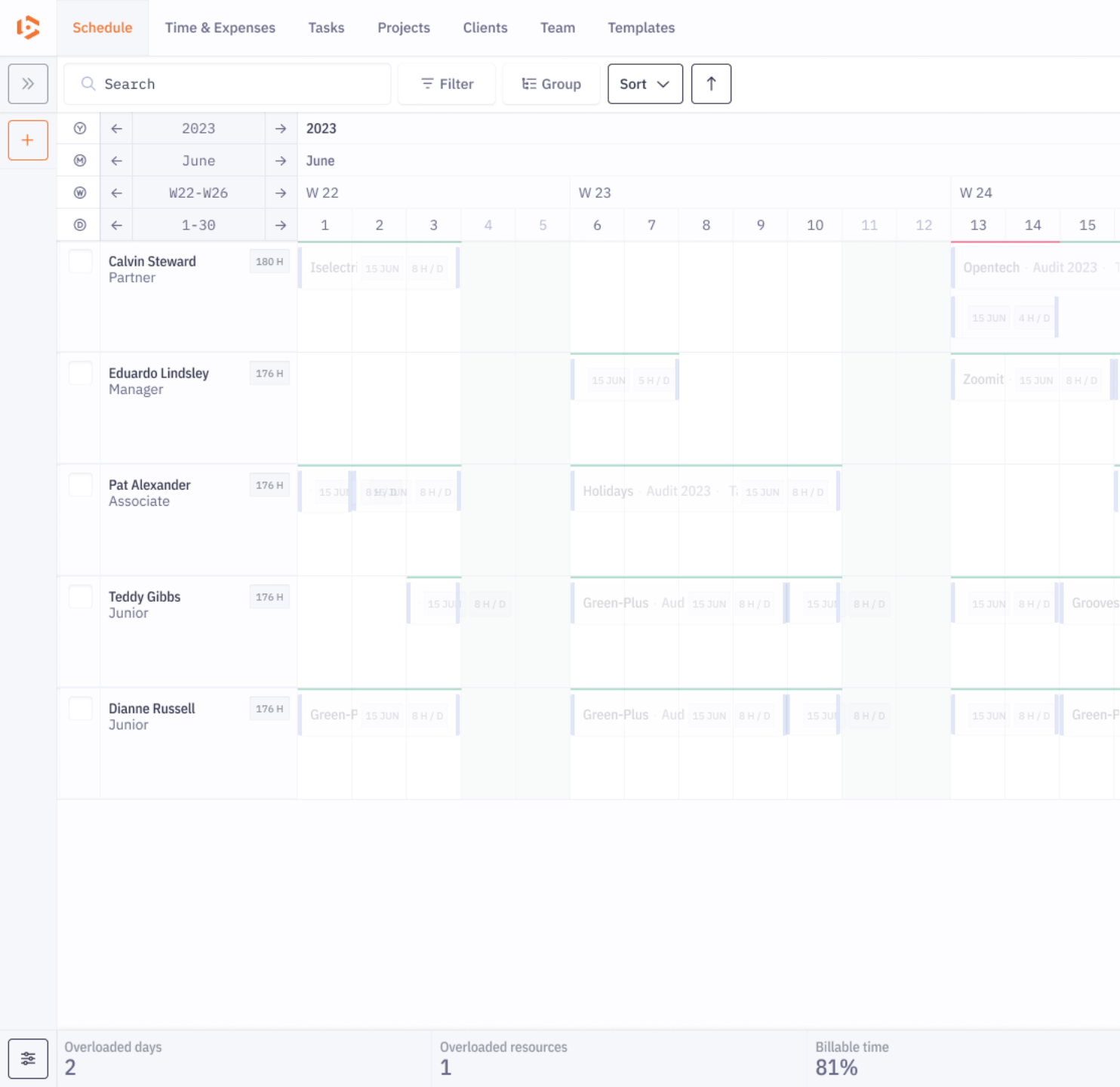
155 h

Estimate at completion (h)

0 h

Fees

15



SCHEDULE



Get total visibility over your schedule and adapt it easily

Zoom in and out to go from the more strategic to the more operational

Filter, group and sort information to find exactly what you need

Save your favorite settings as views to consult them later or share them

Schedule

Time & Expenses

Tasks

Projects

Clients

Team

Templates

🔍

🔔

🔗

⚙️

👤

Add ▾

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🔍

Search

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Filter

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Group

Sort ▾

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2023

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2023

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June

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June

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W 26

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27

28

29

30

Calvin Steward

Partner

180 H

Iselectri

15 JUN

8 H / D

Eduardo Lindsley

Manager

176 H

15 JUN

5 H / D

Pat Alexander

Associate

176 H

15 JUN

8 H / D

15 JUN

8 H / D

Holidays

Audit 2023

Tu

15 JUN

8 H / D

Teddy Gibbs

Junior

176 H

15 JUN

8 H / D

Green-Plus

Aud

15 JUN

8 H / D

15 JUN

8 H / D

15 JUN

8 H / D

Grooves

15 JUN

8 H / D

Dianne Russell

Junior

176 H

Green-P

15 JUN

8 H / D

Green-Plus

Aud

15 JUN

8 H / D

15 JUN

8 H / D

15 JUN

8 H / D

Green-P

15 JUN

8 H / D

Opentech

Audit 2023

Tu

15 JUN

8 H / D

15 JUN

4 H / D

Isdom

Audit 2023

Tas

15 JUN

8 H / D

Scottech

Audit 2023

Tu

15 JUN

8 H / D

Zoomit

15 JUN

8 H / D

15 JUN

8 H / D

15 JUN

8 H / D

Holidays

15 JUN

8 H / D

15 JUN

8 H / D

Scottech

Audit 2023

Tu

15 JUN

8 H / D

Scottech

Audit 2023

Tu

15 JUN

8 H / D

Green-Plus

Audit 2023

Tu

15 JUN

8 H / D

Green-Plus

Audit 2023

Tu

15 JUN

8 H / D

📅

Overloaded days

2

📅

Overloaded resources

1

📅

Billable time

81%

📅

Billable

61 540 \$

📅

Late tasks

0

Schedule

Time & Expenses

Tasks

Projects

Clients

Team

Templates

🔍

🔔

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⚙️

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Add ▾

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🔍

Search

≡

Filter

≡

Group

Sort ▾

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2023

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2023

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June

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June

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W22-W26

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W 23

W 24

W 25

W 26

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30

General Motors Audit 2023

174 H

Iselectr

15 JUN

8 H / D

General Motors - Audit 2023

15 JUN

8 H / D

Opentech - Audit 2023

15 JUN

8 H / D

Isdom - Audit 2023

Tue

15 JUN

8 H / D

Scottech - Audit 2023

Tue

15 JUN

8 H / D

Calvin Steward Partner

40 H

General Motors - Audit 2023

15 JUN

8 H / D

Opentech - Audit 2023

15 JUN

4 H / D

Isdom - Audit 2023

Tue

15 JUN

8 H / D

Scottech - Audit 2023

Tue

15 JUN

8 H / D

Eduardo Lindsley Manager

54 H

General

15 JUN

8 H / D

General Motors - Audit 2023

15 JUN

3 H / D

General

15 JUN

8 H / D

Zoomit

15 JUN

8 H / D

Zoomit

15 JUN

8 H / D

Zoomit

15 JUN

8 H / D

Holidays

15 JUN

8 H / D

Holidays

15 JUN

8 H / D

Scottech - Audit 2023

Tue

15 JUN

8 H / D

Pat Alexander Associate

24 H

General Motors - Audit 2023

15 JUN

8 H / D

Holidays - Audit 2023

Tue

15 JUN

8 H / D

General

15 JUN

8 H / D

General

15 JUN

8 H / D

Holidays

15 JUN

8 H / D

Scottech

15 JUN

8 H / D

Scottech - Audit 2023

Tue

15 JUN

8 H / D

Teddy Gibbs Junior

56 H

General Motors - Audit 2023

15 JUN

8 H / D

Green-Plus - Audit 2023

15 JUN

8 H / D

Green-Plus - Audit 2023

15 JUN

8 H / D

Green-Plus - Audit 2023

15 JUN

8 H / D

Grooves

15 JUN

8 H / D

General Motors - Audit 2023

15 JUN

8 H / D

General Motors - Audit 2023

15 JUN

8 H / D

Scottech - Audit 2023

Tue

15 JUN

8 H / D

Overloaded days

0

Overloaded resources

0

Billable time

100%

Billable

14 790 \$

Late tasks

0



Schedule

Time & Expenses

Tasks

Projects

Clients

Resources

Templates

Search

Filter

Group

Sort

Card

2023

2023

June

June

W26

Week 26

26 - 01

Monday

26

Tuesday

27

Wednesday

28

Thursday

29

Friday

30

Saturday

1

Sunday

Junior

Position

188 h

1 •

32 h

44 h

40 h

40 h

32 h

—

—

Abby Cooper

Junior

28 h

1 •

-8 0 h

+4 12h h

Adobe · Audit 2023 · 8h/d

Wells Fargo · Audit 2023 · 4h/d

8 h

8 h

8 h

—

—

—

Iris Vance

Junior

40 h

8 h

8 h

8 h

8 h

8 h

Dow · Audit 2023 · 8h/d

—

—

Aubrey Thomas

Junior

40 h

8 h

8 h

8 h

8 h

8 h

Adobe · Audit 2023 · 8h/d

—

—

Matthew Abbott

Junior

40 h

8 h

8 h

8 h

8 h

8 h

Walmart · Audit 2023 · 8h/d

—

—

Sophia Stewart

Junior

40 h

8 h

8 h

8 h

8 h

8 h

Walmart · Audit 2023 · 8h/d

—

—

Senior

Position

144 h

5 •

32 h

32 h

32 h

24 h

24 h

—

—

Anna Warren

Senior

40 h

8 h

8 h

8 h

8 h

8 h

Walmart · Audit 2023 · 8h/d

—

—

Claire Godfrey

Senior

80 h

5 •

+8 16 h

+8 16 h

+8 16 h

+8 16 h

+8 16 h

Adobe · Audit 2023 · 8h/d

McKesson · Audit 2023 · 8h/d

—

—

—

—

—

Francis Simmons

Senior

24 h

8 h

8 h

8 h

-8 0 h

-8 0 h

Dow · Audit 2023 · 8h/d

—

—

Schedule

Time & Expenses

Tasks

Projects

Clients

Resources

Templates

Q

B

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G

U

Add

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Q Search

Filter

Group

Sort

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Card

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2023

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2023

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June

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June

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W26

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Week 26

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26 - 01

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Monday

26

Tuesday

27

Wednesday

28

Thursday

29

Friday

30

Saturday

1

Sunday

Audit 2023

Adobe

104 h

6 •

16 h

1 •

24 h

2 •

24 h

1 •

24 h

1 •

16 h

1 •

—

—

Abby Cooper

Junior

24 h

1 •

-8 0 h

+4 12h h

8 h

8 h

—

—

Adobe · Audit 2023 · 8h/d

Wells Fargo · Audit 2023 · 4h/d

Aubrey Thomas

Junior

40 h

8 h

8 h

8 h

8 h

—

—

Adobe · Audit 2023 · 8h/d

Claire Godfrey

Senior

40 h

5 •

+8 16 h

+8 16 h

+8 16 h

+8 16 h

+8 16 h

—

—

Adobe · Audit 2023 · 8h/d

McKesson · Audit 2023 · 8h/d

Audit 2023

Dow

64 h

16 h

16 h

16 h

8 h

8 h

—

—

Francis Simmons

Senior

24 h

8 h

8 h

8 h

-8 0 h

-8 0 h

—

—

Dow · Audit 2023 · 8h/d

Iris Vance

Junior

40 h

8 h

8 h

8 h

8 h

8 h

—

—

Dow · Audit 2023 · 8h/d

Audit 2023

Walmart

120 h

24 h

24 h

24 h

24 h

24 h

—

—

Anna Warren

Senior

40 h

8 h

8 h

8 h

8 h

8 h

—

—

Walmart · Audit 2023 · 8h/d

Matthew Abbott

Junior

40 h

8 h

8 h

8 h

8 h

8 h

—

—

Walmart · Audit 2023 · 8h/d

Sophia Stewart

Junior

40 h

8 h

8 h

8 h

8 h

8 h

—

—

Walmart · Audit 2023 · 8h/d

Manage views (12)	Completed tasks 27 / 100 27%	Late Tasks 7	Budget (h) 234 h	Budget (\$) 234 567 \$
---	---	------------------------------------	--	--

Tasks	Team progress									
	+ Create view Search Filter Group Sort Columns ListTable									
All tasks	Planned4		Ready8		In Progress3		Needs approval4		Done4	
My tasks	26 FEB2 h VAT Monthly Bookkeeping Green-Plus Gabrielle Chevalier		8 DEC2 h Financial Statements Prep Monthly Bookkeeping Finjob Antwan Denny		20 MAY5 h Financial Statements Prep Monthly Bookkeeping Statholdings Antwan Denny		20 MAR2 h VAT Monthly Bookkeeping Hottechi Dianne Russell		15 MAY1 h Payroll HR Openlane William Speares	
Late tasks										
To-do this week	11 MAR1 h Financial Statements Prep Monthly Bookkeeping Treequote Antwan Denny		15 JAN2 h VAT Mission Domzoom Jane Cooper		1 AUG1 h VAT Monthly Bookkeeping Lexiqvolax Dianne Russell		27 APR1 h VAT Monthly Bookkeeping Yearin Gabrielle Chevalier		8 OCT2 h VAT Monthly Bookkeeping Funholding Jane Cooper	
Team workload										
Team progress	29 JUN2 h Tax Monthly Bookkeeping Sonron Dianne Russell		11 FEB1 h VAT Monthly Bookkeeping Rantouch Jane Cooper		27 SEP2 h VAT Monthly Bookkeeping Betatech Jane Cooper		21 SEP7 h Financial Statements Prep Monthly Bookkeeping Kan-code Antwan Denny		12 DEC2 h VAT Monthly Bookkeeping Conдах Dianne Russell	
	19 NOV2 h Payroll HR Newex William Speares		19 FEB1 h Payroll HR Zotware William Speares				15 OCT2 h Payroll HR Zumgoity William Speares		16 DEC7 h Financial Statements Prep Monthly Bookkeeping Inity Antwan Denny	
			11 JUL2 h VAT Monthly Bookkeeping Golddex Dianne Russell							
			19 DEC2 h							
	Budget7 h		Budget10 h		Budget8 h		Budget12 h		Budget13 h	

Tasks	Team progress				
+ Create view	Search Filter Group Sort Columns List Table				
All tasks	Planned 4	Ready 8	In Progress 3	Needs approval 4	Done 4
My tasks		8 DEC 2 h Financial Statements Prep Monthly Bookkeeping Bioplex Antwan Denny	20 MAY 5 h Financial Statements Prep Monthly Bookkeeping Donquadtech Antwan Denny	20 MAR 2 h VAT Monthly Bookkeeping Dontechi Dianne Russell	12 DEC 2 h VAT Monthly Bookkeeping Gogozoom Dianne Russell
Late tasks			1 AUG 1 h VAT Monthly Bookkeeping Zencorporation Dianne Russell	27 APR 1 h VAT Monthly Bookkeeping Bioholding Jane Cooper	
To-do this week			27 SEP 2 h VAT Monthly Bookkeeping Rangreen Jane Cooper		
Team workload			20 MAR 2 h VAT Monthly Bookkeeping Goodsilron Dianne Russell		
Team progress			27 APR 1 h VAT Monthly Bookkeeping Toughzap Gabrielle Chevalier		
		21 SEP 7 h			
	Budget7 h	Budget10 h	Budget8 h	Budget12 h	Budget13 h
Manage views (12)	Completed tasks27 / 100	Late Tasks27%7	Budget (h)234 h	Budget (\$)234 567 \$	

Tasks

<<

Team progress

+ Create view

Search

Filter

Group

Sort

↓

Columns

List

Table

All tasks

My tasks

Late tasks

To-do this week

Team workload

Team progress

Jane Cooper

10

✓

26 FEB

2 h

VAT

Monthly Bookkeeping

Rangreen

Jane Cooper



15 JAN

2 h

VAT

Monthly Bookkeeping

Rundofase

Jane Cooper



27 SEP

2 h

VAT

Monthly Bookkeeping

Faxquote

Jane Cooper



11 FEB

1 h

VAT

Monthly Bookkeeping

Bioplex

Jane Cooper



19 DEC

2 h

VAT

Monthly Bookkeeping

Hottechi

Jane Cooper



8 OCT

2 h

Budget

7 h

VAT

Monthly Bookkeeping

Rangreen

Owner

Jane Cooper



Due date

28 / 06 / 2023



Description

Checklist

✓

Prep VAT return

✓

Complete the VAT return

Check bank reconciliation

Run VAT report and/or calculate the VAT return details

Draft, review and assemble the VAT return

Review

File VAT return with HMRC once client approves

+ Add

Comments



Jane Cooper

21 / 06 / 2023

Here's a comment



Keisha Harrison

22 / 07 / 2023

Hi Jane



Jane Cooper

Manage views (12)

Completed tasks

27 / 100

Late Tasks

27%

7

Budget (h)

234 h

Budget (\$)

234 567 \$

Tasks

<<

Team progress

+ Create view

Search

Filter

Group

Sort

↓

Columns

List

Table

All tasks

My tasks

Late tasks

To-do this week

Team workload

Team progress

Jane Cooper

10

✓

26 FEB

2 h

VAT

Monthly Bookkeeping

Rangreen

Jane Cooper



15 JAN

2 h

VAT

Monthly Bookkeeping

Rundofase

Jane Cooper



27 SEP

2 h

VAT

Monthly Bookkeeping

Faxquote

Jane Cooper



11 FEB

1 h

VAT

Monthly Bookkeeping

Bioplex

Jane Cooper



19 DEC

2 h

VAT

Monthly Bookkeeping

Hottechi

Jane Cooper



8 OCT

2 h

Budget

7 h

VAT

Monthly Bookkeeping

Rangreen

Planned

Close task

Log time

Cancel

Owner

Jane Cooper

Due date

28 / 06 / 2023

Description

Checklist

Prep VAT return

Complete the VAT return

Check bank reconciliation

Run VAT report and/or calculate the VAT return details

Draft, review and assemble the VAT return

Review

File VAT return with HMRC once client approves

+ Add

Comments

Jane Cooper

21 / 06 / 2023

Here's a comment

Keisha Harrison

22 / 07 / 2023

Hi Jane

Jane Cooper

Manage views (12)

Completed tasks27 / 100

Late Tasks27%7

Budget (h)234 h

Budget (\$)234 567 \$

Consulting 2023★

Apple, Inc.

01 / 01 / 2023 → 01 / 06 / 2024

 Nathan Cooper
Partner

Information

Fees

Tasks

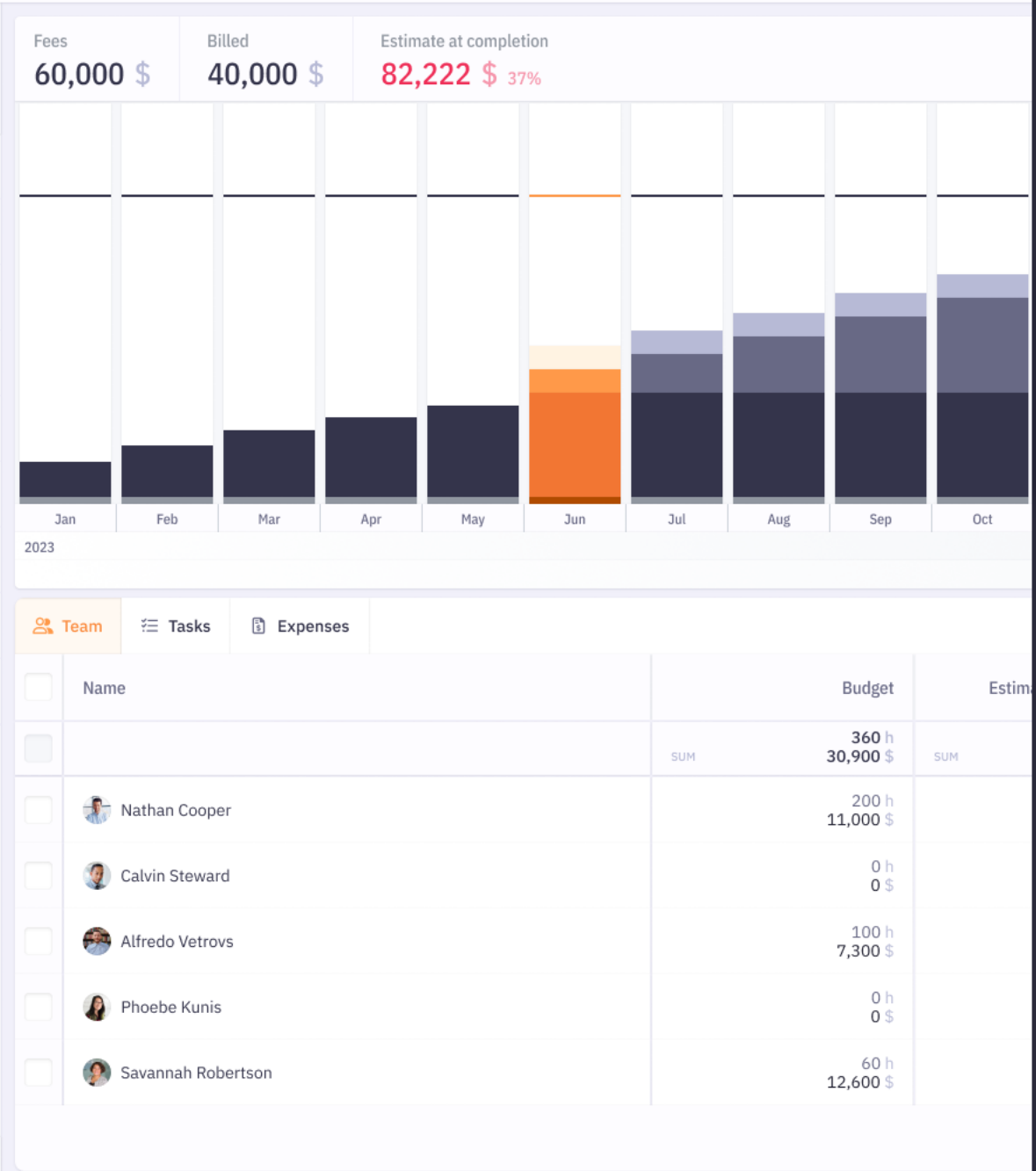
Expenses

Invoices

Files

Export Excel

Settings



 PERFORMANCE ANALYTICS

+

Analyse project performance

Compare fees and estimates at completion

Identify slippage before it's too late

Drill down to task/resource level for finer analysis

Get projet & portfolio level analysis

Fees

60,000 \$

Billed

40,000 \$

Estimate at completion

82,222 \$ 37%

Cumulated graph

H

\$

<

>

June 2023

Fees

60,000 \$

Budget remaining

0 \$

Future scheduled

2,336 \$

Actual

75,886 \$

Expenses

4,000 \$

Day

Week

Month

Team

Tasks

Expenses

	Name	Budget	Estimate at completion	Actual	Future scheduled	Variance
		360 h 30,900 \$	431 h 78,222 \$	399 h 78,886 \$	32 h 2,336 \$	-71 h -47,322 \$
	Nathan Cooper	200 h 11,000 \$	0 h 0 \$	0 h 0 \$	0 h 0 \$	200 h 11,000 \$
	Calvin Steward	0 h 0 \$	2 h 300 \$	2 h 300 \$	0 h 0 \$	-2 h -300 \$
	Alfredo Vetrovs	100 h 7,300 \$	138 h 45,034 \$	106 h 42,698 \$	32 h 2,336 \$	-38 h -37,734 \$
	Phoebe Kunis	0 h 0 \$	206 h 15,038 \$	206 h 15,038 \$	0 h 0 \$	-206 h -15,038 \$
	Savannah Robertson	60 h 12,600 \$	85 h 17,850 \$	85 h 17,850 \$	0 h 0 \$	-25 h -5,250 \$



Ready to replace your old planning spreadsheets?

Ⓢ	←	2023	→	2023														
Ⓜ	←	June	→	June														
Ⓦ	←	W22-S26	→	W 22	W 23							W 24						
ⓓ	←	1-30	→	1	2	3	4	5	6	7	8	9	10	11	12	13	14	
		Calvin Steward Partner	180 H	Iselectrics	8 H / D				General Motors		8 H / D					Opentech		
		Eduardo Lindsley Manager	176 H	General Motors	8 H / D				General Motors		8 H / D					Zoomit		
				Acme, Inc.	8 H / D													
		Pat Alexander Senior	176 H	Acme, Inc.	8 H / D				Absence - Congés									

Estimate at completion
 4 620,50 \$

 Dianne Russell

19 FEB

Monthly Bookkeeping
Accounting 2023

Bioplex
 Ongoing

19 FEB

Monthly Bookkeeping
Accounting 2023

Rangreen
 Ongoing

15 NOV