



**bakertilly**

**Back Office**  
Case Management Application





CASES | BILLING | TIME MANAGEMENT | PROCESS FLOW

# Making smart decisions in dynamic work

What is Baker Tilly Back Office Application? Solution where processes are less structured, interactions are more ad hoc, events and milestones are easy to timeline. Its solution type of work where lots of different data from different sources must be collected, parsed, summarized for decision-making, and acted upon. Solution that focuses on driving all business process inside a company. From the first client interaction, case progress, task management, time management, invoicing, alerts to keep the process flow intact.





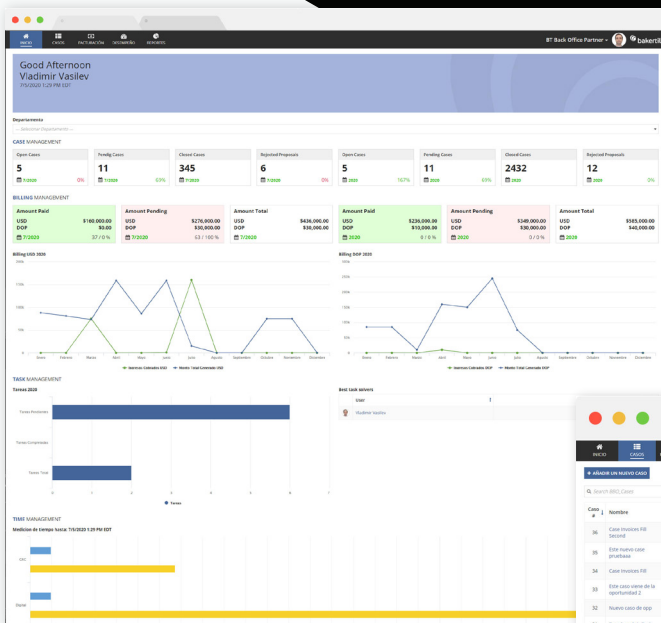
## 10 Signs you might need Baker Tilly Back Office Software

If you're reading this, it's likely you don't use case management software to help you make optimal decisions, control and complete look of business processes. And, that's a shame...because you're missing out.

So how can you be sure it's right for your unique circumstance? Following are some reasons you might need Baker Tilly Back Office software. Do any of these sound familiar? You know you need case management when...

1. You are drowning in paper.
2. There is not consistent visibility across cases.
3. You have to log in to 2...no 3...no 8 systems to find the right information.
4. You are using spreadsheets to manage case work.
5. You have multiple solutions to address all of your case needs, each with its own log on.
6. You deal with the swivel effect: look at this screen, then swivel to look at that screen.
7. Your portal environment has created a seemingly never-ending morass of old, wrong stuff.
8. You have the most complex Excel documents ever known.
9. You work in the field with just a clipboard.
10. Navigating through documents to find the right one takes more than a few seconds.

# Key Features



## Case Dashboards

Ease performance monitoring and sustain improvement.

## Appian Records

Converge all case information—including data, processes, and collaborations—in a single drillable summary.

Case #	Nombre	Cliente	Moneda	Moneda	Fecha de Propuesta	Departamento	Status	Meses Reportados	Meses Estimados	Completitud
36	Case Invoicing PII Internal	Baker Tilly	USD	\$1,500,000.00	Jul 3, 2020	Digital	Con Aceptado	0	300	2%
38	Case Invoicing PII Internal	Baker Tilly	USD	\$1,500,000.00	Jul 3, 2020	Consultoria - GRC	Pendiente Aceptacion	0	20	2%
34	Case Invoicing PII Internal	Baker Tilly	USD	\$100,000.00	Jul 3, 2020	Digital	Con Aceptado	0	120	2%
39	Case Invoicing PII Internal	Baker Tilly	USD	\$1,500,000.00	Jul 3, 2020	Consultoria - GRC	Pendiente Aceptacion	0	5	2%
32	Nuevo Caso de app	Baker Tilly	USD	\$150,000.00	Jul 2, 2020	Consultoria - GRC	Pendiente Aceptacion	0	2%	2%
31	Test Case Sub-Task	Baker Tilly	USD	\$5,000.00	Jul 1, 2020	Digital	Pendiente Aceptacion	0	2%	2%
30	Transformacion Digital 2020	Baker Tilly	USD	\$20,000.00	Jul 2, 2020	Consultoria - GRC	Pendiente Aceptacion	0	5	2%
29	Test Case Sub-Task	Baker Tilly	USD	\$5,000.00	Jul 1, 2020	Digital	Con Aceptado	3	120	2%
28	Transformacion Digital 2020	Baker Tilly	USD	\$5,000.00	Jun 30, 2020	Digital	Con Aceptado	10	40	2%
33	Nuevo Caso de app	Baker Tilly	USD	\$150,000.00	Jul 2, 2020	Consultoria - GRC	Pendiente Aceptacion	0	2%	2%
31	Test Case Sub-Task	Baker Tilly	USD	\$5,000.00	Jul 1, 2020	Digital	Pendiente Aceptacion	0	2%	2%
30	Transformacion Digital 2020	Baker Tilly	USD	\$20,000.00	Jul 2, 2020	Consultoria - GRC	Pendiente Aceptacion	0	5	2%
29	Test Case Sub-Task	Baker Tilly	USD	\$5,000.00	Jul 1, 2020	Digital	Con Aceptado	3	120	2%
28	Transformacion Digital 2020	Baker Tilly	USD	\$20,000.00	Jun 30, 2020	Consultoria - GRC	Con Aceptado	10	40	2%

## Smart Alerts

Keep stakeholders perpetually in-the-know.

## Scalable Platform

Adapt and grow with your business.

## Enterprise Mobility

Equalize the ability to get more done, in the office and in the field.

## Intuitive User Interface

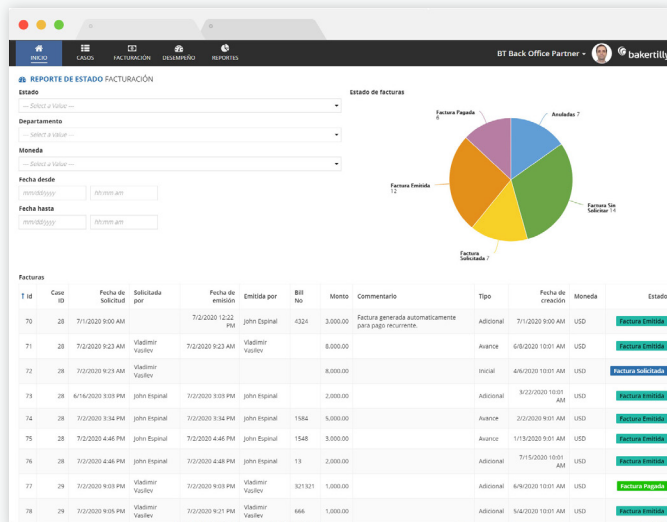
Ease-of-use translates to faster stakeholder buy-in.

## Advanced Content Management

Streamline information capture, control, and use. Plus, it's included.

Case Invoices Fill Second interface showing Summary, Milestones, Personal, and Detalles sections. It includes fields for Client, Department, Services, and Billing information.

# Key Features



**Fast Integration**  
Make connecting information easy.

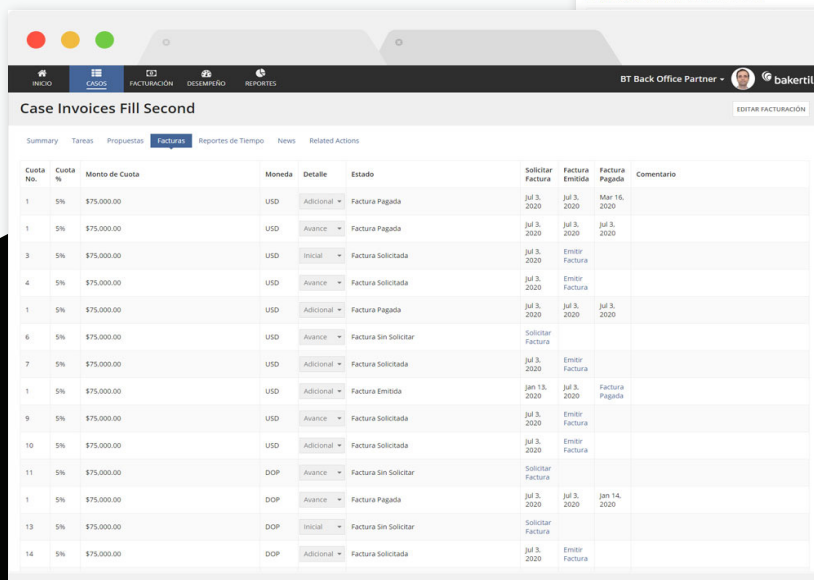
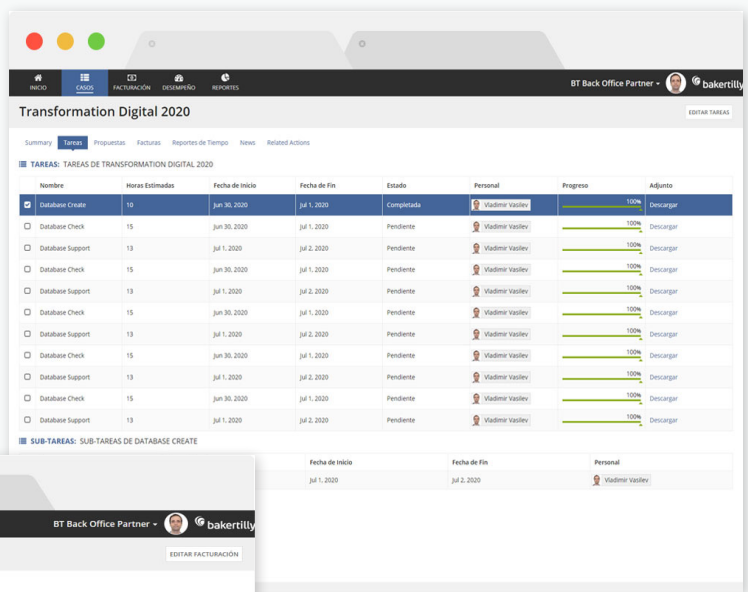
**Instant Access**  
Access needed information—on any device, at any time—and improve performance.

**Document Sharing**  
Quickly and securely share appropriate case files.

**Real-time Analytics and Reporting**  
Stay on top of key performance indicators and metrics.

**Social Tasks**  
Allow users to assign ad-hoc tasks for faster case actions.

**Baker Tilly CXM Connector**  
Application offers pre-build connection with Customer Experience Management Application





# bakertilly

**Back Office**  
Case Management Application

POWERED BY

**Appian**



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