

WGS CPA Portal

Complete Practice Management for Modern CPA Firms

Feature Overview & Product Guide

World Group Solutions

www.worldgroupsolutions.com

Dashboard & Client Management

Get a real-time bird's-eye view of your entire practice from a single screen.

Feature	Description
Live Dashboard	At-a-glance metrics: active clients, pending tasks, upcoming deadlines, revenue tracking
IRS Deadline Countdown	Automatic countdown timers for key tax deadlines (April 15, Oct 15, quarterly estimates)
At-Risk Client Alerts	AI-flagged clients who may miss deadlines or have incomplete documents
Client Intake Form	Digital onboarding with SSN (last 4), filing status, dependents, income sources
Client Status Tracking	Pipeline view: New → In Progress → Review → Completed → Archived
Custom Fields	Define firm-specific fields (dropdown, text, date, checkbox) per client
Bulk Actions	Export, status change, or email multiple clients at once

Document Management & AI Intelligence

Secure document storage with AI-powered extraction and analysis.

Feature	Description
Secure Upload & Storage	Encrypted cloud storage with per-client folders and subfolders
Document Categories	Auto-categorize: W-2, 1099, ID, Bank Statements, Receipts, Tax Returns
AI Document Analysis	Automatic extraction of key data points from uploaded tax documents
Folder Organization	Nested folder structure with drag-and-drop organization
E-Signature Requests	Send documents for client signature with tracking and audit trail
Signature Status	Real-time tracking: Pending → Viewed → Signed with timestamps
Document Search	Full-text search across all documents and metadata

AI Tax Suggestions

Powered by advanced AI models, WGS CPA Portal analyzes client data and documents to surface potential deductions, flag anomalies, and suggest filing optimizations — saving preparers hours of manual review.

Secure Client Portal & Communication

Give clients a branded, password-free portal to submit documents and stay informed.

Feature	Description
Magic Link Access	Clients access their portal via secure 30-day token links — no passwords needed
Branded Experience	Custom firm logo, colors, welcome message, and footer text
Document Upload	Clients self-serve upload W-2s, 1099s, IDs, and other documents by category
Tax Organizer	Interactive questionnaire that clients fill out before their appointment
Case Status Tracker	Clients see real-time status of their return preparation
E-Signature	Clients sign engagement letters, 8879, and other forms electronically
SMS Messaging	Two-way SMS communication with clients (Twilio integration)
In-App Chat	Real-time messaging between staff and within the firm

Task Management, Calendar & Reporting

Feature	Description
Task Board	Create, assign, and track tasks with priority levels (Low, Medium, High, Urgent)
Task Status Pipeline	Kanban-style workflow: To Do → In Progress → Done
Calendar View	Visual calendar with task due dates, deadlines, and appointments
Deadline Notifications	Automatic email alerts for upcoming and overdue task deadlines
Time Tracking	Built-in timer with billable/non-billable hours and hourly rate tracking
Reports & Analytics	Client status reports, revenue summaries, document analytics, staff workload
Data Export	Export client data, documents, and reports in multiple formats

Staff Management & Security

- Role-based access control (Admin vs Staff) with row-level security
- Staff invitation system with email-based onboarding
- Per-user notification preferences (email & SMS)
- Complete audit trail for all document and signature actions
- Single-tenant architecture — each firm gets its own isolated instance

Ready to Modernize Your Practice?

WGS CPA Portal is built for CPA firms that want to streamline client management, eliminate paper workflows, and deliver a modern client experience.

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Schedule a Demo: Contact your WGS representative