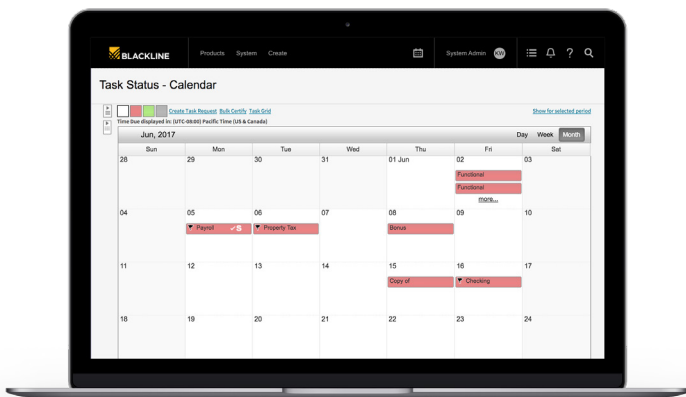BLACKLINE PRODUCTS

Task Management

Manage your close from end to end with BlackLine Task Management.

Centralize and control any accounting and finance checklist. Attach and preserve all supporting documents and define role-based workflows to automatically assign tasks to your team. Further streamline and manage your close with BlackLine's powerful reporting capabilities and real-time dashboards.

Leverage BlackLine Task Management to attain the efficiency, visibility, and control your business requires.

Benefits

CENTRALIZE CHECKLISTS
BlackLine Task Management provides a centralized platform for managing your accounting and finance checklists. Track and control month-end tasks, recurring journal entries, operational checklists, and more.

AUTOMATE PERIOD-ENDS
Define logic to automatically schedule recurring close tasks each period.

STREAMLINE WORKFLOWS
Hierarchical task lists and role-based workflows seamlessly execute across accounting and finance. Integrate with Journal Entry and Account Reconciliations to further guarantee tasks are completed in the correct order.

CONTROL THE CLOSE
Utilize real-time dashboards and enhanced reporting to transform your close with unmatched transparency and business intelligence.

INCREASE VISIBILITY
BlackLine's enhanced reporting allows you to compare expected versus actual completion times and report on any user-defined field.

COMPLY WITH POLICIES
BlackLine lets you structure and schedule your close while staying within best practices and company policy so that audits run smoothly.

MAINTAIN SCHEDULES
Choose from multiple holiday calendars and time zones to fit your business needs. Use business days, calendar days, or weekdays, or configure your own periods to schedule your close.

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Use Cases

BlackLine Task Management provides a configurable, web-based command center where you can manage and automate your accounting and finance tasks.

Ten Use Cases for Task Management:

1. Accounting Checklists
2. Finance Checklists
3. Operational Checklists
4. PBC Lists
5. Compliance Controls
6. Period-end Tasks
7. Close Calendars
8. Recurring Journal Entries
9. Tax Filings
10. Supporting Documentation

Features & Capabilities

Tasks Grid

- **Visualize Your Tasks** - An Outlook style task calendar color codes by task and timeliness.

- **Configure Task Segments** - Apply Task Management to any type of recurring project or ad-hoc task.

- **Schedule Due Dates** - Automatically schedule recurring tasks in relation to your period-end date. You can also set up custom frequencies or calendars.

Tasks Template

- **Centralize Comments** - Attach comments to tasks. These can be temporary review notes, one-time comments, or recurring text that carries forward to future tasks.

- **Attach Supporting Documents** - Do away with paper. Upload supporting documentation to BlackLine's secure, centralized document repository.

- **Calculate Actual Completion Time** - Management can compare actual to expected completion time to determine where resources can be best allocated. This also assists with outsourcing.

- **Track Certification Details** - Full audit trail tracks and timestamps all certification events for each user.

- **Define Task Dependencies** - Task dependencies allow for the creation of hierarchical sub-task relationships and give you the ability to structure your close in BlackLine.

"BlackLine has given us a greater amount of efficiency in terms of workflow. It replaced all our manual processes. We have everything in a one-stop shop."

—SHAY CARROLL, ACCOUNTING DIRECTOR GSAS, WESTERN UNION

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