ACCOUNTING CS®

CS PROFESSIONAL SUITE®

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KNOWLEDGE YOU CAN TRUST

The Tax & Accounting business of Thomson Reuters—the world's leading information resource—brings you the most comprehensive line of integrated software, research and guidance available to the accounting profession.

POWERFUL. PRODUCTIVE. PROFITABLE.

The CS Professional Suite combines powerful data sharing, paperless processing and online convenience to help you achieve a more productive and profitable practice. After all, when you're able to customize just the right mix of suite solutions for your firm, you can do some amazing things—like streamline firm workflow, strengthen client ties and maintain a competitive edge. And that's pretty powerful stuff.

Keep reading to go beyond integration—and straight to real-time collaboration.

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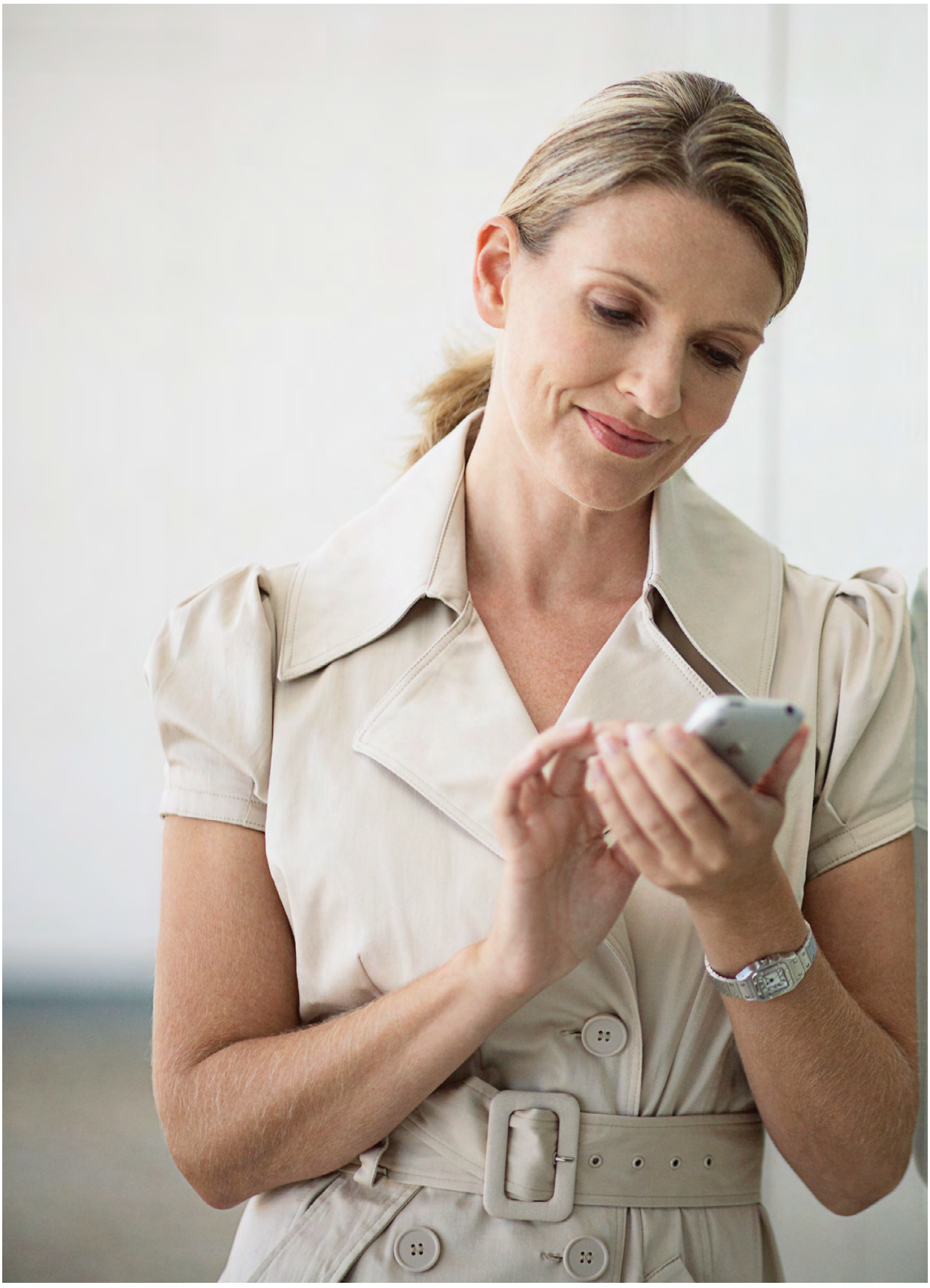


BEYOND INTEGRATED: ACCOUNTING CS

Accounting CS represents a new level of productivity and a new set of possibilities in professional-grade tax and accounting software. Built from the ground up to take full advantage of the web, it combines write-up, trial balance, payroll, financial reporting and client accounting into one platform, one database.

It frees you and your staff to process data across multiple clients and functions, connecting your firm with clients, information and applications in new ways. It allows you to securely collaborate with clients in real time, sharing the same database and the same interface with no imports, no exports and no updates. It's a single, complete solution that goes beyond integration. And it's redefining what's possible in the tax and accounting profession.

Timesaving setup options: Firm-wide templates allow you to standardize the setup process, saving time and improving consistency across multiple business and entity types.

Greater security with customizable work spaces: You can customize work spaces to allow staff to see only what their job requires them to see.

Enhanced automation: A smarter interface automatically finds and verifies much of the information you need and integrates with other applications automatically, making the setup process faster.

Cross-client and multi-user processing capabilities: Accounting CS can divide work by task or by client. This frees you and your staff to process tasks for several clients at once, allows multiple staff members to work in the same client simultaneously and allows staff to specialize by task. And a single, unified interface spans the whole process, shortening the learning curve and accelerating productivity.

Unparalleled reporting power: New report options and a custom report designer make it easy to analyze data and add value. Powerful grouping and printing features make it easier to print, file and distribute reports.

Revolutionary collaboration features: Accounting CS Client Access redefines collaboration with a shared database that enables you and your clients to access the same data in real time. This makes imports, uploads, transcription errors and client data clean-up a thing of the past.

Powerful payroll capabilities: Accounting CS makes after-the-fact payroll processing faster and easier and allows you to keep clients in compliance with federal, state and local requirements.

Versatile integration features: Enhanced integration brings even more power to Accounting CS by enabling you to import data directly from other CS Professional Suite applications, from spreadsheet files and from a variety of third-party software, including QuickBooks®.

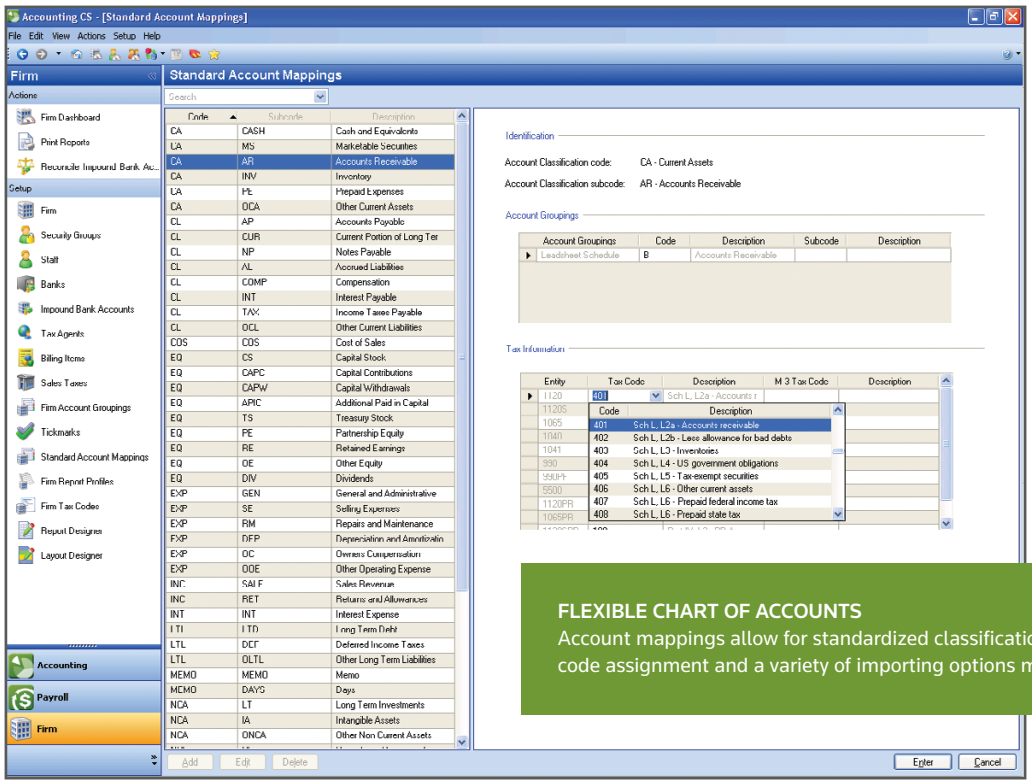
New ways to buy and use your software: With our flexible, affordable Software as a Service (SaaS) leasing model in addition to our Virtual Office CS® option and more traditional desktop-based delivery models, you can choose precisely the right option for your firm.

> "There is no comparison to the new Accounting CS Client Access combo. Clients migrate very easily to Client Access and I have found that they like it much better. They have a much better ability to search and filter, making it easier for them to find data that they need. They also like that we are using the same system—so no more export/importing data—and when we make adjustments, they are instantly available for the client to see."
>
> **—Ryan McCowan, Greene McCowan & Co, PLLC, London, KY**

FASTER SETUP

We've designed the setup process for Accounting CS to help you get up and running quickly and set the stage for maximum productivity, even across multiple entity types and business structures.

With that in mind, we've developed automatic integration with other CS Professional Suite products. We've developed a templated setup process that enables you to apply the same standards to multiple clients in one step. And we developed powerful automation that finds much of the information you need and gets you to the output stage faster. It all means faster setup, a leaner, more productive staff—and perhaps most importantly, a fatter bottom line.



FLEXIBLE CHART OF ACCOUNTS
Account mappings allow for standardized classification codes and tax code assignment and a variety of importing options make setup easy.

EASIER SETUP

- **Streamline standard account mappings** to better integrate with UltraTax CS and generate financial statements more quickly.
- **Use firm-wide templates** to quickly set up standards for client and employee information. Industry-specific client templates have been added—including Restaurant, Construction, Retail and more.
- **Import chart of accounts data, transactions, balances and employee data** from a Microsoft® Excel® spreadsheet.
- **Create up to 20 customizable account segments** to build a robust chart of accounts mask that can handle up to 60 alphanumeric characters in any order.
- **Set up an unlimited number of account groupings** and related codes and subcodes to group accounts on reports and financial statements.
- **Easily organize separate account segments** in general ledger accounts by using optional color codes and separators.
- **Maximize your multiple-monitor setup** with sophisticated functionality that lets you see more at once, saving paper and time when reviewing balances.
- **Set up vendor records** for 1099 and trade vendors and pay them via paper check or direct deposit.
- **Customize your workspace** with separate firm, client and staff dashboard views; customizable keyboard shortcuts and user preferences; and a fresh look and feel.
- **Easily convert clients** from CS Professional Suite Accounting, EasyACCT Write-Up®, CCH Client Accounting Suite Premier® (CPA Software) and QuickBooks Pro, Premier or Enterprise.
- **Enter account balances and make adjustments faster** with the spreadsheet-style Trial Balance grid.

SOPHISTICATED FIRM-WIDE SECURITY

- **Set up custom security groups** for specific job types with firm-wide security features.
- **Limit staff access** to specific client and firm information.
- **Modify security privileges** by entire data entry screens or by specific data entry fields to secure access to sensitive information.
- **Enable an audit trail on certain events** by using event tracking.

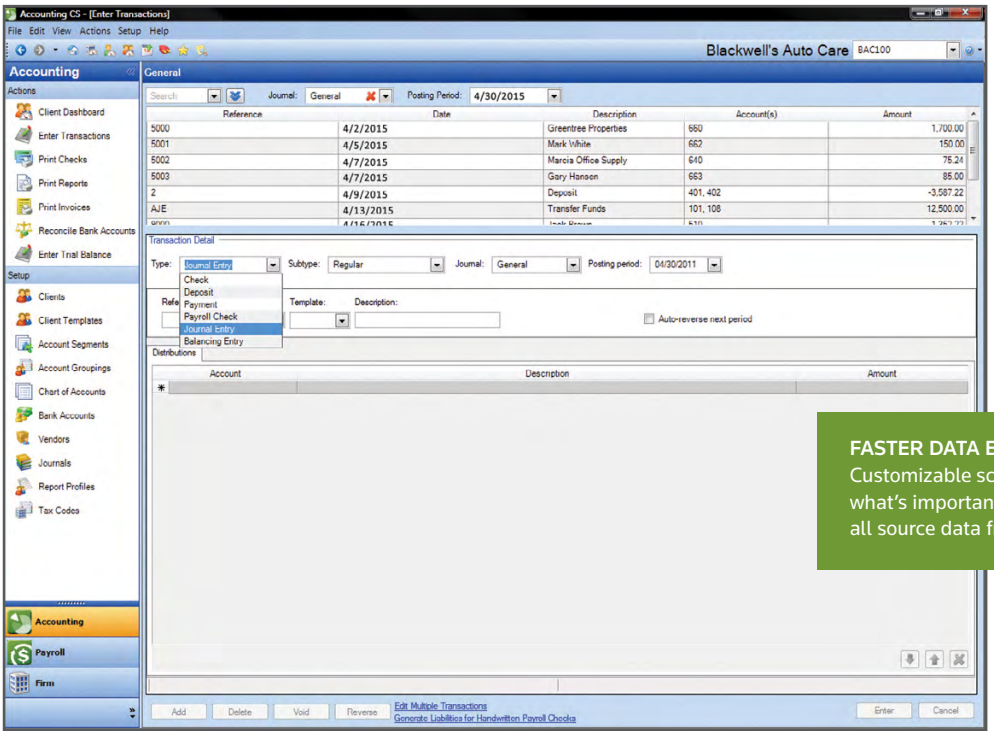
SEAMLESS IMPORTING AND DATA SHARING

- **Share data directly with UltraTax CS, Fixed Assets CS and Practice CS**, including year-end data, W-2 and 1099 information.
- **Import general ledger account balances** into UltraTax CS with no additional data entry.
- **Import data from third-party applications**, including Microsoft Excel and QuickBooks.
- **Import vendor amortization schedules** from ToolBox CS and TValue™.
- **Ability to export client data** to Lacerte®, ProSystem fx® or ProSeries® for tax reporting.

NEW IDEAS IN WORKFLOW AND STAFFING

Accounting CS takes an entirely new approach to getting work done. It can divide work by task or by client, creating efficiencies and workflow gains that can revolutionize your firm.

You can now divide workload in new ways and allow your staff to specialize by task. You can allow several staff members to work in the same client simultaneously. You can filter data so that your staff sees only what they need to see. And because the entire process uses a single database, there's less risk of error or lost data and it's easier to track activities and maintain consistent standards across the firm.



FASTER DATA ENTRY
Customizable screens help staff focus on what's important and allow staff to enter all source data from one screen.

NEW WORKFLOW POSSIBILITIES

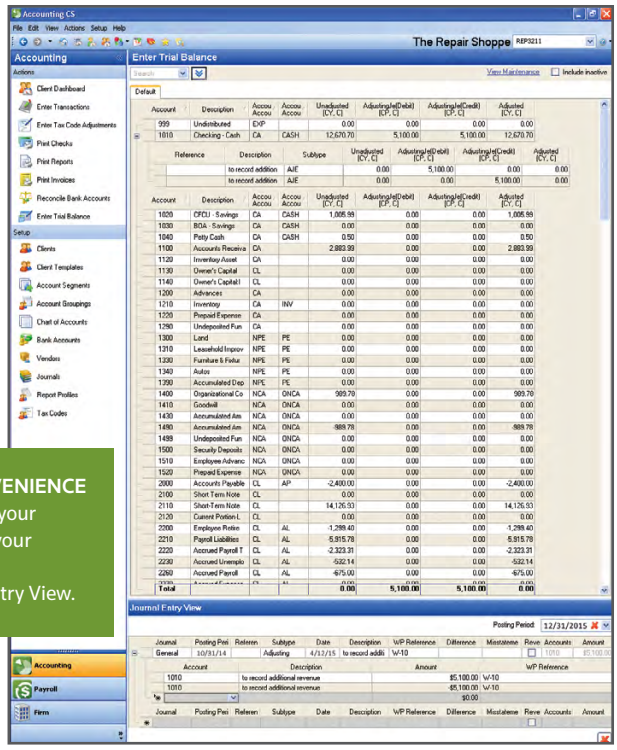
- **Allow multiple staff to work in the same client**, perform payroll and write-up operations simultaneously and continue use of the application during multi-client processing.
- **Perform the same task for multiple clients in one step** with powerful cross-client automation.
- **Customize data entry preferences**, including the ability to choose between a general ledger (journal-based) view and a checkbook register (bank account-based) view.
- **Choose which setup items to make inactive** in various screens (general ledger accounts, employees, clients and others).
- **Post transactions to other general ledger periods** without leaving the current data entry screen.
- **Use the Analyze Account Activity feature to quickly generate an at-a-glance view** of the current client's general ledger balances and drill down into the source data entry.

IMPROVED DATA PROCESSING POWER

- **Reconcile bank statements more easily** with built-in reconciliation features including bank statement import, the ability to set reconciling frequency and troubleshooting tools to help explain where unreconciled amounts are coming from.
- **Unfinalize reconciliations** to easily make corrections.
- **Store accounting and payroll data** for an unlimited number of prior years.
- **Track any supporting information you choose** using the custom fields feature.
- **Save time and reduce data list sizes** by filtering data in screens throughout the program.
- **Pay bills and write checks electronically** with a single point of data entry.
- **Edit, delete or void multiple transactions** in one step.
- **Use transaction templates** to set up recurring journal entries and automatic calculations while maintaining complete control over frequency and timing.

NEW TRIAL BALANCE FEATURES

- **Switch the basis for your financial statements**—tax, book, budget and more.
- **Create an unlimited number of customized views** in the trial balance grid.
- **Create detailed, customized worksheets and variance reports**.
- **Easily handle departmental and locational clients** with improved chart of accounts flexibility.
- **Use a wide variety of special journal entries**, including adjusting, automatic, reclassifying, tax, potential and more.
- **Consolidate client data** by account number or account grouping.
- **Use more than 30 predefined tickmark images** to indicate the review status of accounts, or create custom tickmarks by uploading images or entering text.
- **Easily create custom tax codes** to control how balances flow and how subschedule detail is displayed in your tax program.
- **Store up to 5 different budget amounts** per client.

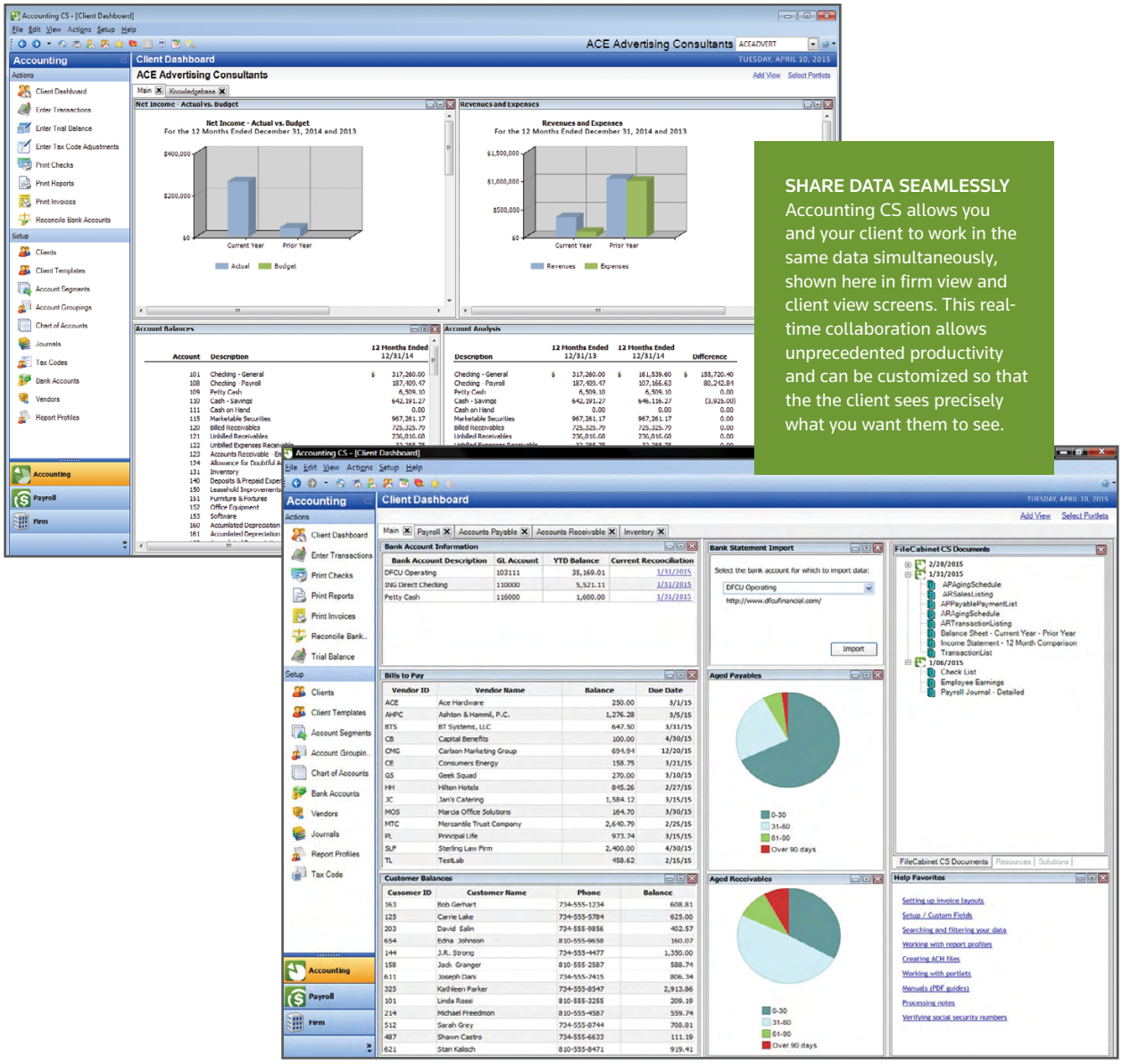


SPLIT-SCREEN CONVENIENCE
Immediately see how your journal entries affect your trial balance with the convenient Journal Entry View.

ACCOUNTING CS CLIENT ACCESS

Optional Accounting CS Client Access provides your clients with a full-featured, online small business accounting and live payroll application that's fully integrated with your firm. You and your clients share the same online database, the same user interface and the same real-time data. Adjustments and new data are available to you and your clients instantaneously, with no imports, exports or updates necessary. And yet you maintain complete control over your clients' day-to-day bookkeeping.

You can set up and maintain Accounting CS Client Access right from your desktop, without visiting your clients' offices. Software updates are applied automatically. And because you and your clients see the same interface, there's no separate client accounting application to learn.



SHARE DATA SEAMLESSLY
Accounting CS allows you and your client to work in the same data simultaneously, shown here in firm view and client view screens. This real-time collaboration allows unprecedented productivity and can be customized so that the the client sees precisely what you want them to see.

SAVE TIME

- **Reduce non-billable hours**: No need to manage multiple applications, no imports or exports and no client software to maintain.
- **See client data in real time**: Because you and your clients work in the same database, you can see their most current data anytime.
- **Make adjustments available to clients instantly**: When you make a change, your clients see it instantly.
- **Save reports in multiple formats**, including Microsoft Word, Excel, HTML and PDF.
- **Automatically reconcile online bank transactions.**
- **See relevant financial information at a glance** with the dashboard-based interface.

BUILD STRONGER RELATIONSHIPS

- **Reduce turnaround times** to improve productivity and enable your clients to make more informed business decisions.
- **Offer clients a better alternative to QuickBooks.**
- **Collaborate with clients online** in real time.
- **Enable your clients to produce real-time reports** with constantly updated data.
- **Provide your clients with additional productivity software,** including FileCabinet CS, GoFileRoom and Microsoft Office.
- **Enable your clients to make electronic payments directly in Accounting CS**, with a single point of data entry.

MAINTAIN CONTROL

- **Control which data** your clients can manipulate.
- **Keep control** over how your clients perform day-to-day bookkeeping.
- **Customize client report options** and choose which reports to make available on a client-by-client basis.
- **Limit access to data** by individual field or screen.

STREAMLINE CHECK CREATION

- **Automate check writing and daily bookkeeping** functions for your clients.
- **Print checks in batches or one at a time**.
- **Easily record bank activity, including** bank deposits, ATM activity, bank debits, credits and transfers and send vendor payments via direct deposit.

AUTOMATE CLIENT PAYROLL

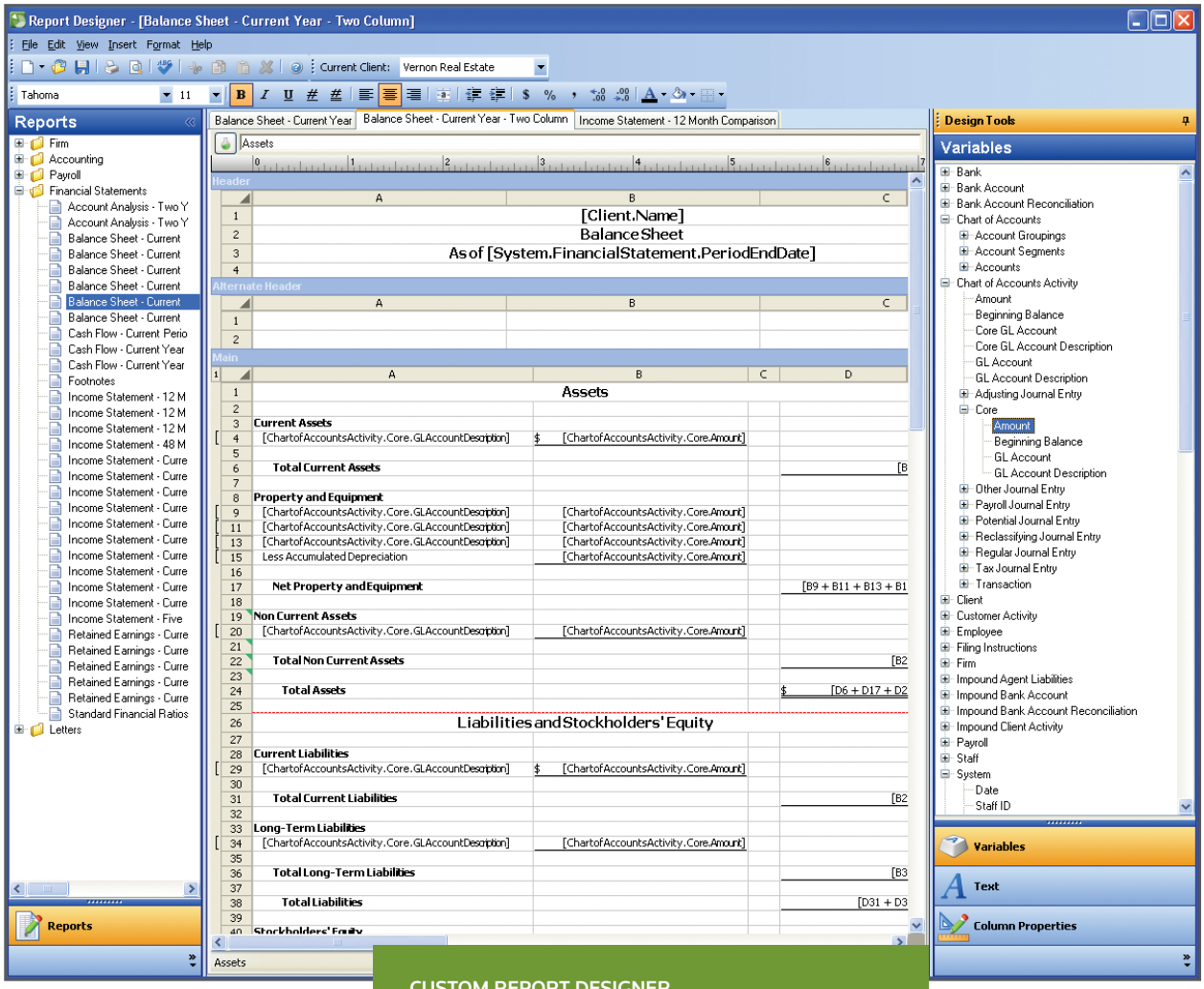
- **Enable clients to calculate state and local withholding automatically** based on company and employee addresses.
- **Easily handle multiple-department and multiple-location employee processing** and reporting.
- **Quickly import time** from an Excel spreadsheet or a variety of supported time clock vendors.
- **Automatically track and pay payroll liabilities.**
- **Automatically calculate tipped employee payroll.**
- **Handle 401(k)** and other pre-tax deductions.
- **Handle courtesy withholding of employee income** for states and locals in Michigan, Ohio and Pennsylvania.

PROCESS ACCOUNTS PAYABLE & RECEIVABLE

- **Identify and display the source of a transaction.**
- **Set up firm-wide terms** for all clients.
- **Use a variety of easy-to-create reports**, including Aging Schedule, Cash Requirements, Payable and Payment List, Purchases Journal and Payment List.

UNBEATABLE REPORTING CAPABILITIES

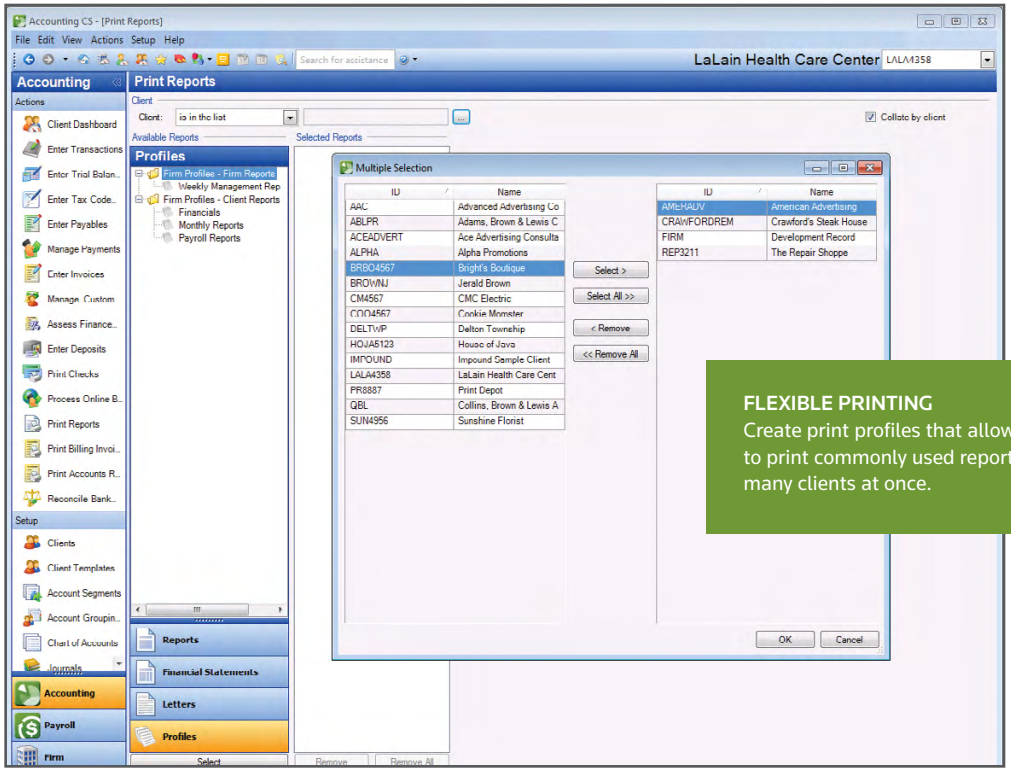
When it's time to analyze and present your data, Accounting CS offers more reporting options than ever. You can choose from a wide variety of firm management, payroll and accounting reports and financial statements, or create your own from scratch. You can group them together into bundles (or profiles) that can be used over and over across multiple clients. And it's easy to print the whole profile with the click of a mouse, for one client, all clients or anything in between.



CUSTOM REPORT DESIGNER
Choose from a variety of customizable standard reports, or create your own with the custom report designer.

FLEXIBLE DOCUMENT OUTPUT

- **Create presentation-quality client financial statements and reports** with the custom report designer.
- **Create custom internal report formats** tailored to your firm's specific reporting needs.
- **Choose from more than 40 built-in report templates** or create your own.
- **Make firm-wide changes to financial statement formats** for greater consistency across multiple clients.
- **Use a spreadsheet-like row-and-column layout** to design your statements.
- **Maintain control** over which report types clients can access.
- **Modify fonts, add borders**, even add your logo or other graphics to reports, statements and letters.
- **Group reports into an unlimited number of custom report profiles** that can be used over and over to send pre-selected bundles of reports to multiple clients with one click.
- **Easily distribute reports** as files including Microsoft Excel, Microsoft Word and Adobe® Acrobat®; send them via NetClient CS secure client portals or email; store them in FileCabinet CS and GoFileRoom; and more.
- **Choose from a variety of global printing options**.
- **Print reports for multiple clients** simultaneously.
- **Set up custom formulas** for printing calculated values.
- **Use conditional expressions** to tailor document appearance to each client's needs.
- **Import or export report formats** to share custom designs with other professionals.
- **Define printer tray per type of output** and automatically insert separator pages.
- **Search for specific text and amounts** on reports and financial statements when in print preview.
- **Password-protect PDF files,** including reports, checks, invoices and payroll tax forms.



FLEXIBLE PRINTING
Create print profiles that allow you to print commonly used reports for many clients at once.

POWERFUL PAYROLL CAPABILITIES

Whether you're using it to do your firm's internal payroll or for client work, Accounting CS offers powerful after-the-fact payroll capabilities for firms like yours. Fully automated and fully tax-compliant, it will help you expand your reach and keep your clients compliant.

The features listed here are included in the Accounting CS base application, as is the ability to process after-the-fact payroll for your firm. Optional Accounting CS Payroll adds live payroll for your firm and your clients, opening the door to one of the fastest-growing opportunities in the profession.

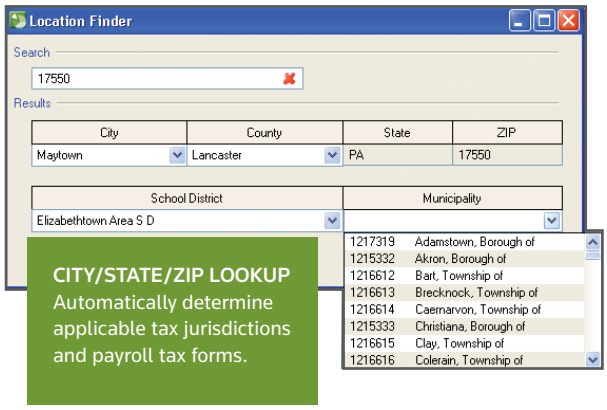
PAYROLL HOME DASHBOARD
The Form and Filing Information portlet automatically gathers and updates payroll information in a single screen, including form availability, due dates, filing addresses and more.

COMPREHENSIVE SETUP FEATURES

- **Automatically determine applicable tax jurisdictions** and payroll tax forms with the ZIP code lookup feature, or choose an even more accurate address-based lookup system for the most challenging payroll tax states.
- **Easily set up employees who work in multiple locations** and departments.
- **Create new hire files for all states**, including independent contractor new hire files for CA.
- **Import earnings and taxes for new employees from a spreadsheet file.**
- **Create multiple fee schedules** and automatically calculate fees on a per-tax-form basis.

POWERFUL TAX COMPLIANCE FUNCTIONS

- **Process a wide variety of local forms**, including W-2, W-2C, 940, 941, 941-X, 943, 943-X, 944, 944-X, 945, 945-X, 1099, 1099 Corrected, state payroll tax forms and certain local payroll tax forms (AL, CA, CO, KY, MI, MO, NJ, NY, OH, PA) using a streamlined batch payroll tax process, including electronic filing and EFTPS processing.
- **View critical and informational diagnostic messages** within the Edit Payroll Tax Forms screen.
- **Give client employees access to paystubs, W-2s, W-4 information** and more with Employee Self-Service.



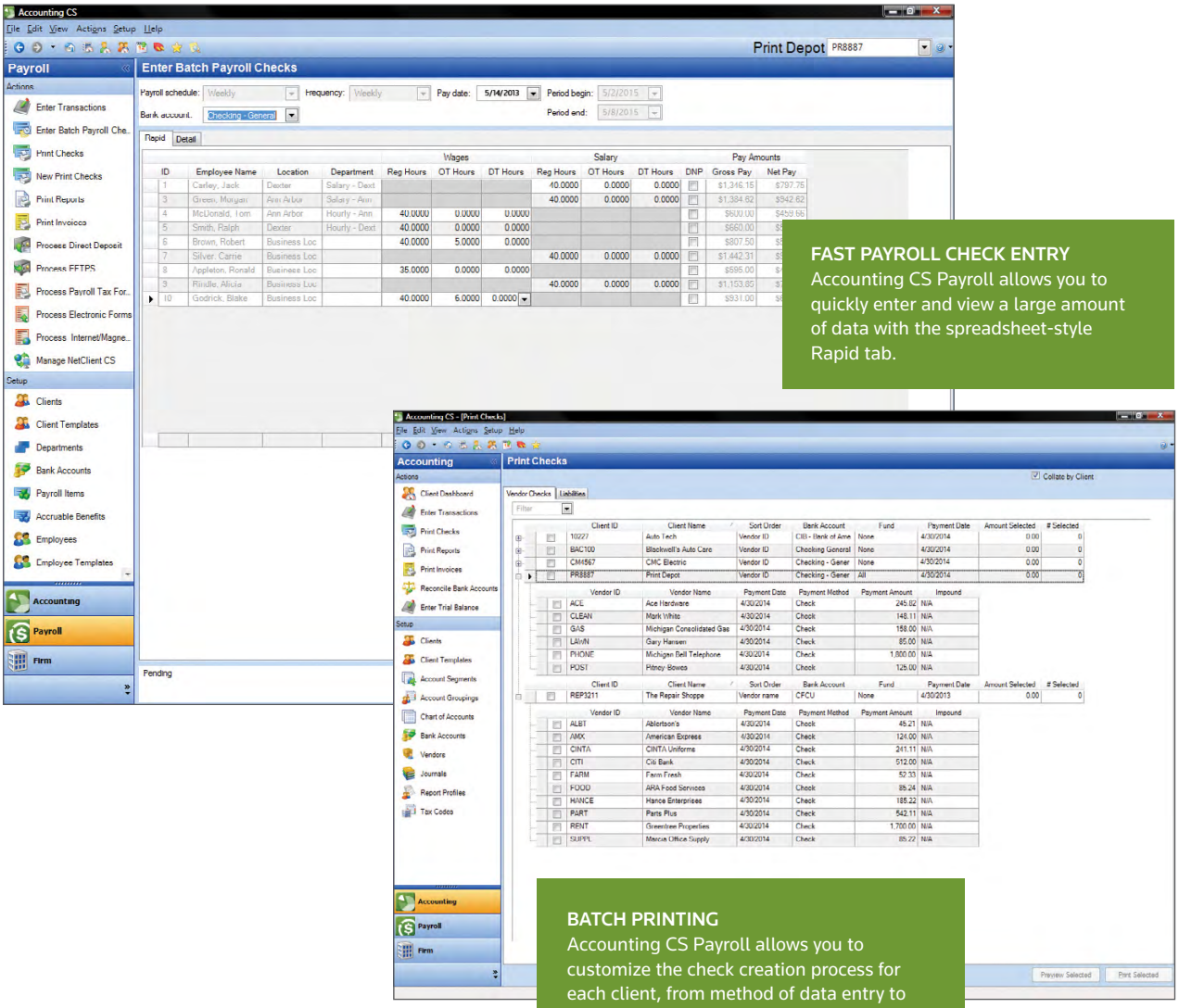
- **Automatically print corresponding payment forms** when printing tax liability checks.
- **Expedite EFTPS processing** by easily creating federal enrollment files and federal tax payments.
- **Create adjustment liability transactions** for discrepancies between liability calculated for tax forms and liability created for payroll checks.
- **View and enter workers' compensation descriptions** and codes for each state.
- **Calculate federal and state tax deposit amounts** and generate checks for those amounts.
- **Affordable Care Act reports and compliance forms** to calculate employees' average hours worked and businesses' average number of full-time employees.

SOPHISTICATED PROCESSING

- **Calculate an unlimited number of pay, deduction and employer contribution items.**
- **Handle weighted average overtime calculations.**
- **Calculate creditor garnishments**.
- **Process cafeteria plan deductions, retirement plan deductions and company matching amounts**, including "safe harbor" employer contribution plans and employees' retirement plan catch-up contributions.
- **Set maximum limits on deductions** for automatic turnoff.
- **Verify federal, state and locality-specific minimum wage amounts** for reported tip income.
- **Calculate allocated tips and tips deemed to be wages**.
- **Calculate reported tips based on employee sales** or hours and overtime hours worked.
- **Handle the tip credit reduction calculation.**
- **Record handwritten payroll checks**.
- **Enter and report hours used for benefits** like vacation, sick time and personal time.

VERSATILE EXPANSION OPTIONS

Accounting CS combines an unprecedented number of functions into one package, allowing you to precisely tailor your services to your clients' needs, integrate with your other software applications and offer advanced features like the ability to enter data remotely. It's easy to customize Accounting CS to do precisely what you need today, then add additional functions as your firm grows. Our series of add-ons makes the base program even more powerful in areas like engagement and payroll. And each one combines seamlessly, retaining the single-platform interface of the core application.



FAST PAYROLL CHECK ENTRY
Accounting CS Payroll allows you to quickly enter and view a large amount of data with the spreadsheet-style Rapid tab.

BATCH PRINTING
Accounting CS Payroll allows you to customize the check creation process for each client, from method of data entry to final sort order. When you're ready, you can print checks for multiple clients in one step.

ACCOUNTING CS PAYROLL

Accounting CS Payroll adds a variety of powerful features to the Accounting CS platform, including the ability to:

- **Process multiple payroll schedules** per client.
- **Enter payroll checks faster** using the spreadsheet-style Rapid tab within the Enter Batch Payroll Checks screen.
- **Import time clock data** as ASCII or XML files from a variety of supported time clock vendors.
- **Import Microsoft Excel spreadsheet data** for automatic check creation.
- **Maximize cash flow** with comprehensive impounding features.
- **Electronically fund liabilities** from client accounts.
- **Easily customize accruable benefits** like vacation, sick and personal time with an unlimited number of variables and graduated tables for more detailed tracking.
- **Take advantage** of the program's support for third-party sick pay.
- **Automatically calculate payroll checks** for employees who work in multiple states and multiple localities, honoring applicable state rules and reciprocal agreements.
- **Calculate per-check workers' compensation premiums**, including employee portions of Washington Industrial Insurance (workers' compensation) premiums and employee portions of the New Mexico Workers' Compensation Assessment Fee.
- **Save money on check stock and provide maximum convenience** with MICR check printing and comprehensive direct deposit features including pre-noting, vendor and payroll agent payments, state ACH payment files and child support payments.
- **Perform net-to-gross calculations.**
- **Affordable Care Act reports and compliance forms** to calculate employees' average hours worked and businesses' average number of full-time employees.

WORKPAPERS CS

Workpapers CS offers a completely new way to manage your workpapers, with real-time collaboration and powerful tools for managing documents and data from a variety of sources.

- **Process all types of live workpapers** and link the balances to the trial balance.
- **Share workpapers, comments and instructions with staff** in real time.
- **Accommodate a variety of document types** including Microsoft Word, Microsoft Excel and Adobe Acrobat.
- **Simplify organization, assignment and routing of workpapers** with a simple, sophisticated binder system.
- **Manage workpapers more easily** with a convenient tree structure that offers dynamic folders, subfolders, signoff notations, review notes and a recycle bin.
- **Get real-time, dynamically updated work status and information** with active dashboard portlets.
- **Simultaneously view balances, workpapers, reports and more** with support for multiple monitors.
- **Link Microsoft Word and Microsoft Excel to the trial balance** and get real-time, dynamic balance updates for spreadsheets and financial statements.
- **Expedite your engagements through roll-forward (proforma) of prior-year workpapers** with automated retrieval of current-year balances.
- **Make annotations directly in PDF or other image files** using the built-in image editor.

REMOTE PAYROLL DATA ENTRY

- **Enable clients and client employees to enter time and other payroll information from anywhere** using a secure NetClient CS portal.
- **Get instantaneous access to client payroll data** in Accounting CS with no additional data entry.
- **Reduce input errors and review time** with no re-keying of data.

NEW WAYS TO BUY AND USE YOUR SOFTWARE

Different firms work in different ways. So we offer a variety of flexible licensing options that enable you to get the software you want and provide the services your clients need at the most cost-effective price. Choose from these delivery options:

SOFTWARE DELIVERY–BUY VS. LEASE

- **Software as a Service (SaaS)–**Our newest software delivery option offers a flexible, affordable way to take advantage of the maximum client integration and collaboration offered by Accounting CS—accessible from anywhere, anytime, with a minimal up-front investment.

  You lease our software on a monthly basis and it is hosted at secure data centers. You select the CS Professional Suite and Microsoft Office software you need for your entire firm, based on your firm's staff function profiles and scale up and down according to firm needs. You get all the advantages of safe and secure web hosting, including 24/7 remote access, automatic updates and ensured business continuance, while you pay only for the software you need, when you need it.

- **Virtual Office CS®–**This delivery option combines the hosted convenience of SaaS with a more traditional purchasing and licensing arrangement. It allows the maximum integration and collaboration offered by Accounting CS.

  You can purchase the software and have Thomson Reuters host it at secure data centers. Virtual Office CS gives users 24/7 access to CS Professional Suite software, Microsoft Office software and data via the Internet, enabling staff to work from anywhere. Software updates are deployed automatically and business continuance is ensured since software and data are stored in a secure environment.

- **On-Premise**–This delivery option allows firms to purchase individual programs and host them on local desktops or servers.

  You purchase the individual software programs and services you need, download the software from our website and host it locally on your desktop or firm network.

  For more details on our delivery options, please visit our website at: **Tax.ThomsonReuters.com/HostedOptions**.

For software system requirements, please visit us online at
Tax.TR.com/CSSupport

COMPREHENSIVE TRAINING AND CONSULTING OPTIONS

Make the Most of Your Software Investment and Maximize Firm Productivity

The CS Professional Suite offers an extensive selection of services that can help you get more out of your software investment, including:

STANDARD TRAINING

Our standard training is a great way to bring new staff up to speed, let experienced staff revisit specific topics and/or supplement custom training or consulting. Standard training options include On-Demand, Web, Classroom and Seasonal training.

CUSTOM TRAINING

We offer affordable custom training services that can be tailored to your firm's specific needs. Custom training is taught by our professional instructors and can be delivered either via web training or onsite in a classroom setting.

CONSULTING SERVICES

Our trained consulting professionals can analyze your firm's workflow processes, provide best practices and help you develop a successful implementation and rollout strategy for your CS Professional Suite software.

PROFESSIONAL SERVICES

Put the expertise of our software application consultants and IT experts to work for your firm. Our team can customize applications and data to do exactly what you need, create customized reports, migrate and convert data and even build utilities and tools that can assist your firm with application integration and other technology needs.

ANNUAL SYNERGY CONFERENCE

At our SYNERGY Conference, we offer training at all levels of expertise in a variety of formats, including hands-on, lecture-style and informative roundtable discussions. For more details, visit our website: **Tax.ThomsonReuters.com/CS-SYNERGY**. Professional accreditation is available.

For more information on training and consulting or to register for courses, visit **Tax.ThomsonReuters.com/CSTrainingConsulting**, email us at **CS.Sales@ThomsonReuters.com** or call **800.968.8900**.

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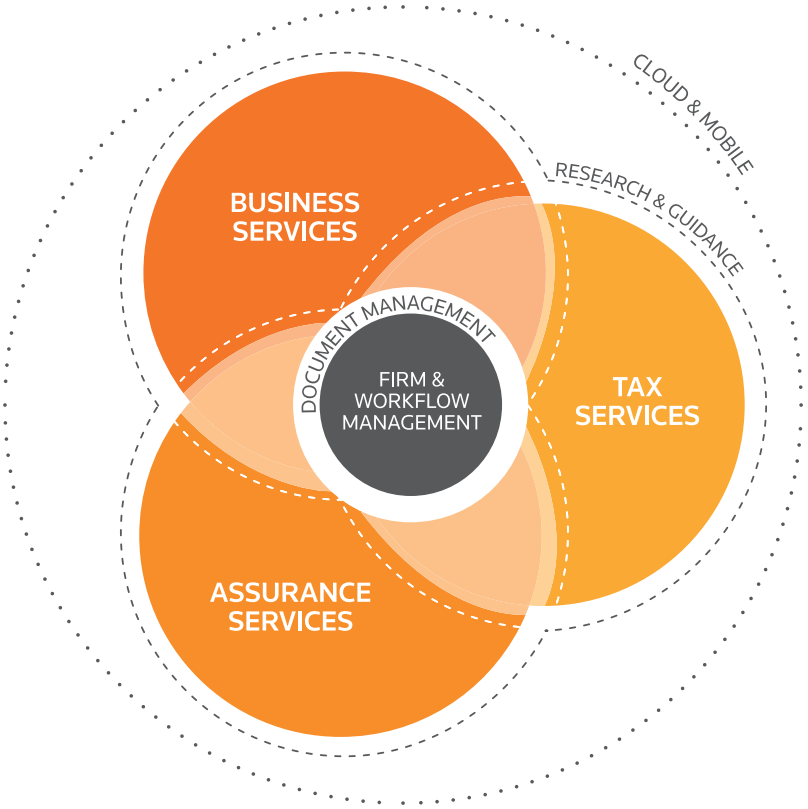
INTEGRATED SOLUTIONS

CS PROFESSIONAL SUITE®



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