

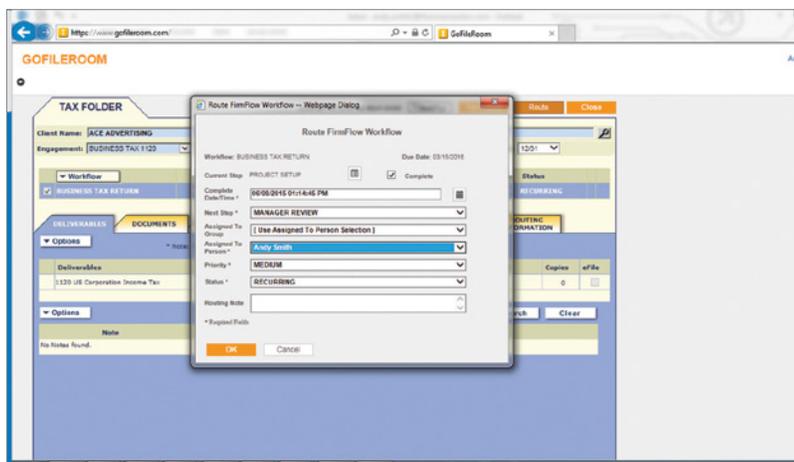
PRODUCT PROFILE

FIRMFLOW

CS PROFESSIONAL SUITE®

Paperless Workflow Management

Thomson Reuters® FirmFlow is a cloud-based workflow software that standardizes business process for full service tax and accounting firms with advanced routing functionality, real-time tracking, custom reporting features, and more. FirmFlow helps automate all your business processes including tax, audit, consulting, financial services, litigation support, and others to streamline both client and non-client engagements.



Convenient routing

Once you are ready to route an assignment to the next person, simply click the Route button.

Maximum organization

As digital and automated business workflows increase, so does the need for a single, centralized solution to manage all of your clients and processes across your firm. With FirmFlow, you can:

- **Work from a familiar interface** and in virtual folders based on the type of engagement. Once created, folders and client information can be rolled forward each year.
- **Standardize all business processes** to ensure consistency and compliance throughout the firm.
- **Increase productivity** by eliminating the physical movement of work with electronically routed and tracked files.
- **Improve staff collaboration** within a single or multi-office firm through shared files and effective communication using categorized notes.
- **Access personalized real-time reporting** and status of client engagements so you never miss a deadline.

Maximum organization (continued)

- **Filter the list of workflows** to show future workflow-step routing assignments.
- **View the workflow deliverables history;** add, modify, extend or delete deliverables; and modify information field values when a workflow is complete.
- **Take advantage of integration** with your existing client database, as well Thomson Reuters® GoFileRoom, Thomson Reuters® GoSystemTax, SurePrep, and Microsoft® Office to digitally manage documents and client files.
- **Connect documents** to your workflow and access them directly from that specific workflow.
- **Customize project processes** to adjust project management based on the type of engagement.
- **Use sophisticated rollover capabilities** to determine which information should roll over from year to year.
- **Personalize your interface** to allow prioritized tabs and fields to be displayed, such as the My Work screen.
- **Access important data quickly,** such as recently added documents or your assigned workflows, on the updated home page.
- **Take advantage of Workflow Intelligence** features like customized alerts and notifications.
- **Run custom reports** to show work assigned to specific users, including inactive users.

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Paperless Workflow Management

Rules and notifications

FirmFlow allows you to set notifications and alerts so you never miss a deadline. And it gives you access to the real-time data that lets you make meaningful and timely management decisions. You can:

- **Receive routing notifications** when work has been assigned to you in the workflow process.
- **Use the built-in due date monitoring** capabilities so you stay on top of your schedule. Set automatic notifications and never miss a deadline.
- **Manage client engagements** to make sure you have the right staff working on the right tasks, and quickly adjust workloads and route changes as needed.
- **Manage staff workflow** using direct assignments or staff pooling and notify staff of changes.
- **Track and resolve open items** within an engagement.

The Value of an Online Solution

Convenient and cost-effective

When you work in the cloud, you know your data is always there when you need it, 24/7. Working online is more cost-effective, saving you countless hours of maintaining your own internal system and giving you maximum productivity with minimal IT investment, including:

- **Lower cost of ownership** — Reduce your investment in hardware purchases, maintenance, and additional IT staff.
- **Rapid deployment** — We take care of all installations and upgrades, so you are always using the most updated version.
- **More growth flexibility** — Grow your business without the risks, costs, and administrative responsibilities associated with developing and maintaining the required infrastructure.
- **Connectivity** — FirmFlow has the ability to connect to different business analytics tools and gains insight on your FirmFlow data.

Assured Security

Safeguard against lost data

In the event of fire, theft, or natural disaster, your data will remain safe and secure, residing in two redundant state-of-the-art data centers. The system uses advanced network and data center security technologies to protect all your documents and data. Access is controlled with username and password authentication and 128-bit SSL encryption. And all user sessions are tracked — providing a complete audit trail.

FirmFlow ensures a level of continuity, availability, backup, and disaster recovery not available with an in-house system.

A variety of security options

FirmFlow offers multiple layers of security, including features that protect emailed documents, allowing only the intended recipients to open and view them.

With FirmFlow, you can:

- **Easily configure access and security privileges** for every user via the system's administration module.
- **Prevent unauthorized access** and restrict back-door access that inherently exists with in-house systems.
- **Maintain user accounts, passwords, and related expiration dates** via an advanced user administration module.
- **Protect emailed documents** by using the on-the-fly PDF Passwords feature, so only intended recipients can open and view.

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