CS Professional Suite from Thomson Reuters

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.

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.
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GoFileRoom — Total Firm Management
Scalable Solution, Unparalleled Service

Security and Convenience
With the GoFileRoom online solution, you have the security of knowing your data is always there when you need it, 24/7. In the cloud — even in the event of fire, theft or natural disaster — your data will remain safe and secure, residing in redundant, state-of-the-art data centers. An online solution is also more cost-effective, saving you countless hours of maintaining your own internal system and giving you maximum productivity with minimal IT investment. GoFileRoom gives you:

• Lower Cost of Ownership — Eliminate your investment in hardware purchases and maintenance, and additional IT staff.

• Rapid Deployment — Completely scalable to your firm’s needs, GoFileRoom can be implemented quickly. And we take care of software updates, so you always have the latest version.

• More Flexibility — Focus resources on your core business, not on IT maintenance. This scalable solution grows as your firm grows — without the risks, costs and administrative responsibilities associated with developing and maintaining the required infrastructure.

Maximum Organization
GoFileRoom standardizes and organizes volumes of documents and offers the flexibility of 24/7 web-based access, so you and your staff can efficiently share, route and review files whenever needed. Remote access lets you access your software and data at any time, from anywhere, securely. Advanced measures ensure the safety and integrity of all your documents.

Whether it’s tax, audit, other client service areas or internal departments such as human resources or accounts payable, you can quickly and securely locate files and review activity at any time. Using GoFileRoom, you’ll enjoy:

Intuitive Navigation
• An intuitive interface that can be personalized based on individual user preferences and ensures fast implementation.

• A dashboard-style home screen where you can view key information from different areas of GoFileRoom through a variety of portlets.

Simplified Workflow
• The optional FirmFlow module enables you to instantly access your current work list, view future assignments and route work through your business process, regardless of location.

• Desktop productivity tools (such as Control Panel and QuickLaunch) allow files to be stored and accessed directly from your desktop without logging in through the GoFileRoom product website.

• Easy one-click storage and retrieval, and batch scanning solution with the option to automatically label and organize individual tax source documents.

• A Rules Wizard tool to easily guide you through the process of building public (firm-wide) and private (individual) rules within GoFileRoom.

• Seamless and meaningful integration with core tax and accounting applications.

• Simple email management — Drag and drop email messages from Microsoft® Outlook® directly into GoFileRoom for easy storage.

• Reduced operating costs — Enjoy unprecedented cost savings by eliminating paper files, storage fees, postage and manual administrative tasks.

• A complete solution to institute a truly paperless office — Start enjoying the cost and time savings associated with a completely digital work environment. Send email messages and other files from Microsoft Word and Excel® toolbars directly into GoFileRoom.
Unmatched Client Service

• Enterprise-level security to keep you in control, ensure business continuance and keep client data safe.

• Proven consulting, training and implementation services, as well as usage strategies provided within our GoFileRoom Best Practices Guidebook.

• Improved management control over client engagements — View real-time, up-to-the-minute information on the status of all your client engagements.

• Unprecedented levels of productivity — With 24/7 access, you can locate any file in seconds providing unmatched client service, whether you are in the office, at home or at a client’s office.

“We chose GoFileRoom for many reasons, but from the start we could see that the software was intuitive and easy to use.”

- Jim Brasher, Tax Services Managing Partner at Baker Tilly Virchow Krause, LLP
Efficiency Features: Built for Speed

Spend Less Time on Individual Tasks and More Time on Business Growth

The dynamic and interactive file cabinet interface of GoFileRoom is exceptionally intuitive and allows you to experience significant time savings immediately. The system was designed with the tax and accounting profession in mind and offers an arsenal of features to support seamless workflow processes and 24/7 web-based access to documents. Spending less time on document management will free up time to focus on your business, which will ultimately lead to enhanced client service. GoFileRoom offers many timesaving features, including:

• **Document management in the cloud** — Locate and deliver documents electronically to clients any time and from anywhere you have an Internet connection. No more manual printing, delivery or delays.
• **A highly configurable solution** — Customize drawers, index structures, workflows and reports so files can be easily located according to the requirements of each department.
• **Fast and easy document searching** — Quickly find any document using search/index fields, keywords, the innovative QuickLaunch tool or by selecting your very own saved searches. You can even search by keyword within a document.
• **Flexible email capabilities** — Drag and drop email messages from Outlook to a GoFileRoom profile, and skip the indexing steps. You can even send dynamic document links to GoFileRoom users and secure outgoing PDFs with on-the-fly passwords.
• **Fast batch scanning of all documents** — With ScanFlow™, you can scan documents in bulk with the highest degree of accuracy. The system automatically converts documents to PDF and files them in the appropriate location within GoFileRoom by leveraging barcode technology. The TaxSort® application applies OCR (Optical Character Recognition) technology to automatically identify and organize scanned 1040 source documents into a bookmarked PDF labeled for easy navigation.
• **Efficient annotation options** — Significantly speed up the preparation and review process by leveraging Adobe® Acrobat’s® native document handling and enabling you to quickly annotate, bookmark, merge, append and highlight documents.
• **Extended integration with Adobe Acrobat** — Use built-in TaxTools to run an electronic calculator tape, optimize dual monitor views and apply hundreds of accounting-specific tickmarks.
• **Easy records retention and maintenance** — With RecordsFlow™, you can establish firm-wide document retention policies that allow you to comply with records retention requirements. For maximum security and control, RecordsFlow requires two independent sign-ons to permanently delete and destroy documents.
• **Efficient management of files for ALL departments** — A true firm-wide solution, GoFileRoom allows you to store all client service and internal department documents in one centralized location for quick access.
• **Save and file Microsoft Office documents in seconds** — Quickly save and edit Word documents, Excel spreadsheets and Adobe PDFs in their native format to GoFileRoom.

Search Features

In addition to the classic search features of GoFileRoom, a new Document Browser Search option lets you navigate through search results by expanding drawers and folders and much more. Sort your search results by column heading and add, rearrange, and remove columns.

By using the Enhanced Search, you can also:

• Search multiple drawers simultaneously. (Users can only search in drawers in which they have access.)
• Access advanced search options, such as searching for multiple document indexes at once.
• Customize the Search screen view.

As with both search pages, you can edit, append and export a document by right-clicking it in the search results list.

**GoFileRoom is used by more Top 100 firms than any other document management and workflow solution.**
Sophisticated Add-On Modules

Streamline Workflow Processes for Your Firm

The power of GoFileRoom extends beyond document management to offer a comprehensive workflow solution. GoFileRoom provides you with integrated modules that help streamline your processes to the point of ultimate efficiency. Modules include:

• **FirmFlow** — Standardize any business process through automated routing functionality, real-time tracking and custom reporting features, and much more.

• **ScanFlow** — Leverage barcode and indexing features to quickly and accurately scan documents and save them to the appropriate location.

• **TaxSort** — Apply OCR (Optical Character Recognition) technology to automatically identify and organize scanned 1040 source documents, and to make client documents instantly ready for tax preparation and review.

• **RecordsFlow** — Manage and comply with document retention requirements by automatically tagging documents for archival or destruction.

GoFileRoom and these integrated modules create a robust system that significantly increases productivity and enhances service to your clients.

“Firms with multiple offices or remote workers cannot do without a document management system in place.”

— Brian Amann
TaxOps, LLC

“Firms with multiple offices or remote workers cannot do without a document management system in place.”

— Jim Brasher
Tax Services Managing Partner at Baker Tilly Virchow Krause, LLP
ScanFlow

Automate Scanning and Save Countless Hours

Fully integrated with GoFileRoom, ScanFlow leverages 100% accurate barcode and indexing features to scan large batches of documents quickly and accurately. ScanFlow is a sophisticated scanning solution that identifies documents as they are scanned and files them in the appropriate folders — relieving your staff of this time-consuming task.

Using ScanFlow, you can track the status of scanned documents from start to finish and receive email notifications to alert you if documents are not scanned in a timely manner. ScanFlow uses one document scanning process for all departments firm-wide including individual tax, business tax, audit and accounts payable. Quality control and integrity features keep you apprised of details that occur during the scanning process. And easy-to-use integration with Adobe Acrobat allows you to scan documents into pre-defined Adobe bookmarks and create a single, nicely organized, bookmarked PDF — similar to tabs in a three-ring binder.

For years, the standard within firms has been to prepare client engagements and scan documents at the end of an engagement. With ScanFlow, you can begin the workflow process by efficiently scanning in batch client files, so they are accessible to staff from the start for a true paperless process.

“Our files are indexed automatically as we scan them in, saving time and keeping us organized. With documents indexed and easily accessible, we can fulfill a client’s request for information in seconds via email or fax.”

— Marc H. Berger
Burr, Pilger & Mayer LLP

Advanced Barcode Functionality

Barcode functionality ensures 100% accuracy and speeds scanning to save hours.
TaxSort

Enhance Productivity During Tax Season

TaxSort automatically identifies and sorts 1040 source documents as they are scanned, places them into logical PDF bookmarks — with the option to customize the bookmarks — and then automatically stores them in the proper client folders in GoFileRoom. It addresses some of the time-consuming tasks associated with the busy tax season such as organizing and scanning client documents. Best of all, it has an automatic Append function that enables you to scan late-arriving documents directly into an existing PDF file.

TaxSort has the ability to analyze and detect document types, including W-2s, 1099s, K-1s, brokerage statements and more. It can determine which client the scanned document belongs to by reading the source documents. Additionally, the software learns from each document scanned and continuously improves its ability to recognize document types and clients. TaxSort is a powerful tool that will save you countless hours during tax season. Once you use it, you will never want to go back to manual scanning and organizing.
RecordsFlow

Ensure All Your Documents Meet Compliance Standards

The RecordsFlow module helps you comply with your records retention requirements, including those that relate to the purging and archiving of documents.

You can define document retention policies that meet the needs of your business and stay flexible enough to set exclusions to rules where necessary. This module enables you to automate the entire records retention process, which will save you time and safeguard against non-compliant document management processes. With RecordsFlow you can:

• Define an unlimited number of retention rules like archiving to make documents permanent or purging to ensure permanent deletion.

• Be confident that documents are assigned the correct retention policy because they inherit that policy based on their document index.

• Allow exclusions from pre-defined rules for documents related to ongoing activity, such as files involved with litigation.

• Create reports showing rules and executed events to ensure ongoing process consistency and compliance.

• Assign specific individuals to act as retention managers and approvers so only certain people have access, archiving and purging privileges.

• Maintain an accurate audit trail on all document retention activities.

• Protect against accidental or unauthorized destruction of documents via a secure double sign-in procedure.

Ensure Compliance
Automate records retention rules to safeguard against non-compliance.
Enterprise-Level Security

Document Level Security Options
Ensure the Integrity of All Your Files

GoFileRoom offers multiple layers of security, so that only authorized users can access specified documents. The system also offers features that protect emailed documents, so only the intended recipients can open and view them. The advanced security options in GoFileRoom enable you to maintain full control over your documents while ensuring their integrity.

The system allows you to:

• Prevent unauthorized access through the GoFileRoom website, restricting “back-door” access that inherently exists with in-house systems.
• Easily configure access and security privileges for every user via the system’s administration module.
• Restrict document viewing, annotating, editing, and other functions by user groups, drawers or even specific documents (for example, by document type).
• 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.
• Control file room structure, index fields and drop down values.
• View detailed document audit trails to monitor every action taken with a document from the time it was created.

Built-In Security and Automatic Back-Ups
Safeguard Against Corrupted or Lost Data

With GoFileRoom, you can be assured that your data is in the safest location possible. The system uses sophisticated network and data center security technologies to protect all your documents and data. Access control employs user name and password authentication and 128-bit SSL encryption. And all user sessions are tracked — providing a complete audit trail.

GoFileRoom is hosted from multiple, redundant data centers that ensure a level of continuity, availability, back-up and disaster recovery not available with an in-house system. DVD copies can also be made of all files and documents on a routine basis.

Ultimate Security
Rest assured your data is in the most secure location, one of our data centers.
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.tr.com/cs-synergy](http://tax.tr.com/cs-synergy).
Professional accreditation is available.

For more information on training and consulting or to register for courses, visit [tax.tr.com/cstrainingconsulting](http://tax.tr.com/cstrainingconsulting), email us at cs.sales@tr.com or call 800.968.8900.

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GoFileRoom Best Practices

The GoFileRoom Best Practices Guidebook and our Training & Consulting Services are designed to ensure that implementation is smooth and adoption rates are high. Unlike other vendors, we have in-house consultants and trainers that are experts at implementing document management and workflow solutions specifically in tax and accounting firms.

Using the GoFileRoom Best Practices Guidebook, you leverage the knowledge gained from hundreds of firm implementations — so you don’t have to re-invent the wheel.

GoFileRoom Best Practices

The GoFileRoom Best Practices Guidebook is provided at no additional cost and helps customers manage internal procedural issues via proven implementation and usage strategies. Highlights from the guidebook include:

• **Practical and actionable recommendations** for transforming every area of your firm into a paperless environment.

• **Accurate and efficient scanning procedures.**

• **Document organization** and indexing templates (including file sections and document types).

• Templates for **managing security and access rights** down to the document level.

• **Integrating your practice management, tax, and audit applications** for maximum efficiency.

• **Answers to questions** your partners will ask.

System Requirements

Thomson Reuters products are designed for professional production work. Our system requirements are based on the assumption that professional accounting firms replace their computer hardware and operating systems approximately every three years. While our products may operate on less powerful hardware and operating systems, we do not believe they will perform at a level suitable for production work in those environments. Of course, as processing speed and RAM are increased, software performance will also improve. We recommend workstation class computers, which generally offer higher levels of performance than home models when running business applications.