

# PRACTICE CS<sup>®</sup>

CS PROFESSIONAL SUITE<sup>®</sup>



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## 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.

### POWERFUL. PRODUCTIVE. PROFITABLE.

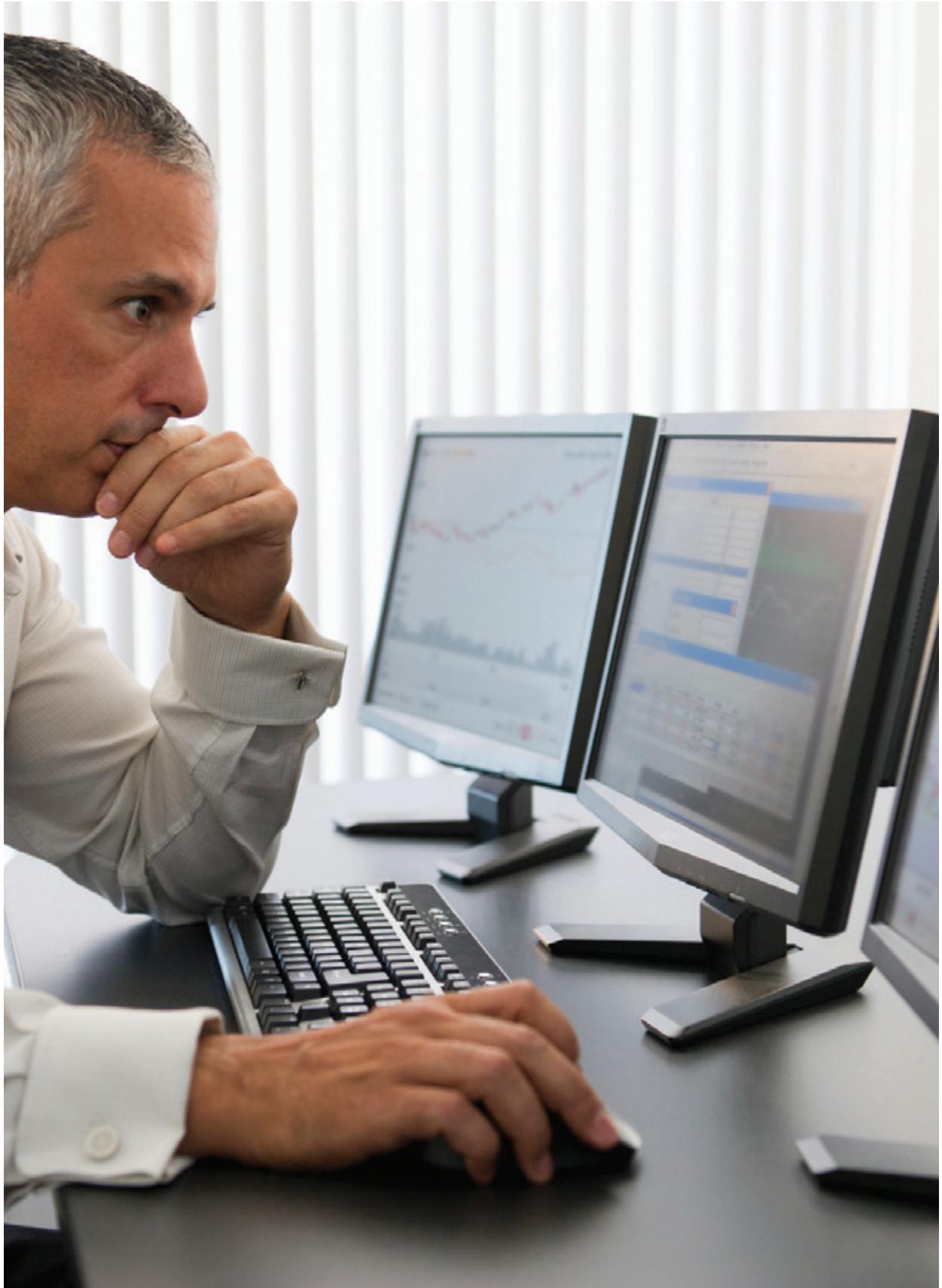
The CS Professional Suite combines powerful data sharing, paperless processing and online convenience to help you achieve a more productive and profitable practice. After all, when you're able to customize just the right mix of suite solutions for your firm, you can do some amazing things—like streamline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

Keep reading to go beyond time and billing and experience the power of advanced practice management with Practice CS.

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# PRACTICE CS

## Totally Integrated Workflow Management—Practice CS Delivers

Most practice management software programs can't manage your entire practice and are typically limited to time and billing or common scheduling tasks. We understand that practice management software needs to do more. So we offer firms the advanced technology required to manage every aspect of their businesses with ease and efficiency.

Setting a new standard for practice management systems, Practice CS offers a unique big-picture perspective that provides valuable insight into your business, guarantees unprecedented client service and ensures that your firm runs at peak productivity. With its advanced "digital dashboard" approach, Practice CS provides real-time status information about your firm, clients and staff. And Practice CS offers completely integrated workflow processes—by integrating with the CS Professional Suite, data in other programs is automatically captured as work progresses and updated in Practice CS.

### **Practice CS redefines practice management software, enabling you to:**

- Streamline your entire workflow process.
- Serve clients more efficiently and effectively.
- Achieve maximum productivity and profitability.

Practice CS combines all of the tools and resources you need to ensure that you're in complete control of your time and expense, billing and accounts receivable. Much more than a time and billing system, Practice CS serves as a workflow hub for your firm, bringing together all of the key information and resources you need to manage your practice. You can even take your practice with you via a unique practice management mobile app and improve your clients' service experience with secure client portals. Best of all, Practice CS has dozens of customizable features that can easily be modified to suit the individual needs of your firm—rather than requiring you to modify your firm to fit the program.

With Practice CS, you have the power to eliminate clutter and centralize all of your day-to-day processes to ensure that your most important tasks and information are always at your fingertips.

# INTUITIVE INTERFACE

## Access Critical Information Anytime, Anywhere

Unlike any other practice management system, Practice CS brings together all aspects of your practice to provide a truly integrated workspace. With its four customizable digital dashboards that let you monitor key information specific to your firm, clients and staff, Practice CS streamlines workflow and drives efficiencies in all of your tasks.

Within each dashboard is a collection of portlets that provide snapshot views of the critical, real-time information you need to run your practice. These portlets include data such as email, billing summaries, receivables, staff availability and much more. In addition to providing a quick view of key information, portlets serve as convenient links to additional resources within your firm—including frequently accessed programs, website links and documents.

If you use FileCabinet CS or GoFileRoom, you can also access all of your electronic documents in seconds, using the convenient FileCabinet CS or GoFileRoom portlet that is available in the Firm, Client and Staff digital dashboards.

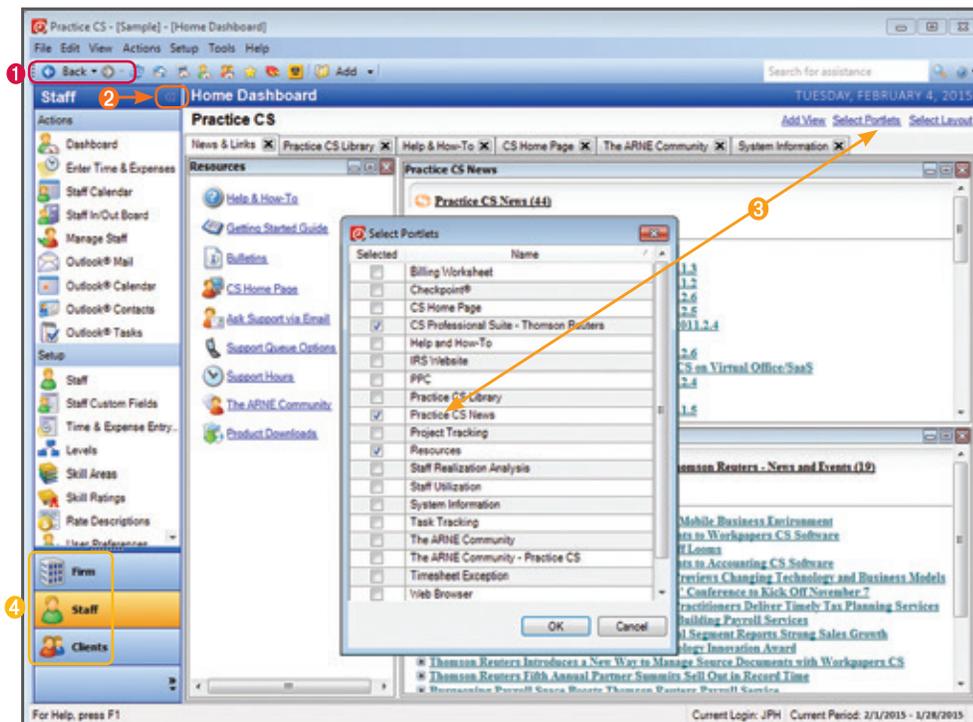
Designed with a familiar Microsoft® Outlook® appearance and feel, Practice CS offers browser-like navigation that enables you to move back and forth within the program with ease and efficiency.

You can use the left-hand navigation pane to quickly jump to different dashboards, actions or setup options. If you prefer to use the top menu bar, you can hide the navigation pane.

Practice CS dashboards can be configured to fit the unique needs of your practice as well as the needs of each individual user. With at-a-glance views of key firm, client and staff information and product news, you can easily get an immediate snapshot of any detail relating to your practice, whenever you need it.

### HOME DASHBOARD

The Home Dashboard is used to display frequently used portlets. These can include system information, the Practice CS News feed, RSS feeds, web pages and many others.



### FULLY CUSTOMIZABLE DIGITAL DASHBOARD

- 1 Use the browser-like navigation bar to quickly move forward and backward with one click.
- 2 Use the double arrow to display or hide the navigation panel.
- 3 Right-click the dashboard or click the Select Portlet link on the top right to show or hide portlets. Move or resize portlets within the digital dashboard to completely customize your display.
- 4 Quickly move between firm, client and staff information.

# FIRM DASHBOARD

## See the Status of Your Firm at a Glance

The Firm Dashboard provides a quick view of the state of your firm's production, billings and staff productivity. This consolidated view makes it easy for you to quickly assess the financial status of your firm without having to search in multiple locations. To maintain security, you can restrict this view to partners and/or other selected employees.

Firm partners and other authorized staff can refer to the Firm Dashboard to review such items as:

- Key financial totals.
- Recaps of Work In Process (WIP) and accounts receivable.
- A summary of staff hours and billable time, as well as staff availability.
- Any standard or custom report—a report can be added to your dashboard as a portlet, allowing firm members to get real-time data on-screen—without having to print a report.

### THE FIRM DASHBOARD—YOUR FIRM'S FINANCIAL PICTURE

- 1 Use filtering and tabs to create multiple “views” of the data.
- 2 View a summary of billing activity.
- 3 See a recap of WIP, including an up-to-the-minute report on what's been produced, billed and adjusted for the period-to-date.
- 4 Get a quick look at accounts receivable—including invoiced amounts, receipts and more.
- 5 In the Staff Targets portlet, compare actual staff hours and billable amounts with targets to evaluate staff in real time and take corrective action to improve efficiency.
- 6 View a summary of staff hours, including total hours worked, billable hours and billable amounts.
- 7 Access key software and tools in the Solutions portlet.
- 8 Access FileCabinet CS and/or GoFileRoom documents.
- 9 Access key totals, such as production, billings, and collections as of the current date, month-to-date and year-to-date.

The screenshot displays the Firm Dashboard for Parnes, Velano, Martinez & Co. The interface includes a navigation pane on the left and a main content area with several portlets. Red numbered callouts (1-9) highlight specific features and data points.

**1. Navigation and Filtering:** The top of the dashboard features a search bar and a set of tabs for filtering data, including 'Firm Summary', 'Dashboard', 'Staff Overview', '24 Period History', 'Firm Year History', 'TimeSheet Exception Report', 'Parnes-JPH', and 'Office-Albany'.

**2. Billing Summary PTD:** A summary table showing key financial metrics:

Billed	\$102,195.02
Progress Billed	1,125.00
Subledger	0.00
Discount	0.00
Sales Taxes	0.00
Service Fees	0.00
Total Invoiced	\$103,240.02

**3. WIP Recap PTD:** A summary table showing Work In Process (WIP) metrics:

Beginning Balance	\$30,217.70
Produced	303,263.20
Billed	(102,195.02)
Billing Adjustments	6,320.77
Progress Billed	(1,125.00)
Ending Balance	\$134,481.70

**4. A/R Recap PTD:** A summary table showing Accounts Receivable (A/R) metrics:

Beginning Balance	\$270,990.73
Invoiced	103,240.02
Receipts	(104,630.00)
A/R Adjustments	(150.00)
Service Charges	10.55
Ending Balance	\$268,450.30

**5. Staff Targets (Period):** A table comparing actual performance against targets for various staff members:

Staff	Est Billable Hrs	Act Billable Hrs	Hrs Variance	Trg Billable Amt	Act Billable Amt	Act Variance
Shreve, Jessica	202.30	134.00	(68.30)	32,368.00	20,250.00	(12,118.00)
Harden, John	205.70	198.00	(7.70)	21,208.50	19,330.00	(1,878.50)
Ulrich, Brian	168.30	151.00	(17.30)	24,402.00	20,253.00	(4,149.00)
Conni, Candace	66.00	4.12	(61.88)	13,860.00	305.20	(13,554.80)
Valery, Mark	158.40	132.00	(26.40)	13,464.00	11,800.00	(1,664.00)
Collins, Herb	187.00	278.00	91.00	23,376.00	37,830.00	14,454.00
Right, Carol	143.00	54.00	(89.00)	18,708.00	12,600.00	(6,108.00)
Kramer, Deborah	187.00	176.00	(11.00)	14,025.00	14,960.00	935.00
Kash, Bruce	198.00	57.00	(141.00)	12,678.00	6,790.00	(5,888.00)
Molitor, Crystal	132.00	13.00	(119.00)	9,240.00	875.20	(8,364.80)
Paxill, Luca	187.00	198.00	11.00	18,255.00	8,800.00	(9,455.00)

**6. Staff Summary (Period):** A table providing a high-level overview of staff performance:

Staff	Billable Amt	Billable Hrs	Total Hrs
Miler, Jonathan	23,625.00	995.00	117.00
Shreve, Jessica	20,250.00	134.00	142.00
Harden, John	19,330.00	198.00	188.00
Ulrich, Brian	20,253.00	151.00	153.00
Conni, Candace	305.20	4.12	4.12
Valery, Mark	11,800.00	132.00	132.00
Collins, Herb	37,830.00	278.00	294.00
Right, Carol	12,600.00	54.00	94.00
Kramer, Deborah	14,960.00	176.00	176.00
Kash, Bruce	6,790.00	57.00	97.00
Molitor, Crystal	875.20	13.00	13.00

**7. Solutions:** A list of software and tools available to the firm, including 'CS Professional Suite', 'Accounting CS', 'Ultra-IP CS 2012', 'Microsoft Office', 'Microsoft Excel 2010', 'Microsoft PowerPoint 2010', and 'Microsoft Publisher 2010'.

**8. FileCabinet CS Documents:** A tree view showing the document structure, including folders for 'Accounting CS', 'Chart of Accounts - Detailed', 'General Ledger', 'Hours', 'Transaction List', 'Parnes CS', 'Activities - 3/31/2015', 'Activity Categories - 3/31/2015', 'Client Groupings - 3/31/2015', 'Client Groupings - 3/31/2015', 'Engagements - 3/31/2015', 'Engagement Categories - 3/31/2015', 'Estimates - 3/31/2015', 'Production Analysts - 3/31/2015', 'Staff Billing Rates - 3/31/2015', 'Staff Groupings - 3/31/2015', 'Staff Levels - 3/31/2015', 'Time and Expense Journals - 3/31/2015', and 'Time and Expense Journals - 3/31/2015'.

**9. Key Totals:** A summary table of key financial metrics:

	Index	CSR	XID	Exec XID
Produced	0.00	303,263.20	735,948.20	409,544.00
Adjusted	0.00	6,320.77	6,720.77	(8,765.00)
Invoiced	0.00	103,240.02	103,275.02	102,344.00
Production	0.003	103,803	107,130	99,180
Collected	0.00	104,630.00	544,671.00	576,672.75



## CLIENT DASHBOARD

### Client Information at Your Fingertips

Practice CS provides the tools to tighten the relationship between your firm and your clients. And the Client Dashboard is the one place where you can see everything that is going on with each client.

The Client Dashboard pulls together critical client information, including contact information, identifying data/information, work in process, billing activity, payment history, current balances and more. The Client Dashboard also includes a Solutions portlet, which organizes all of the documents, applications and online resources associated with specific clients.

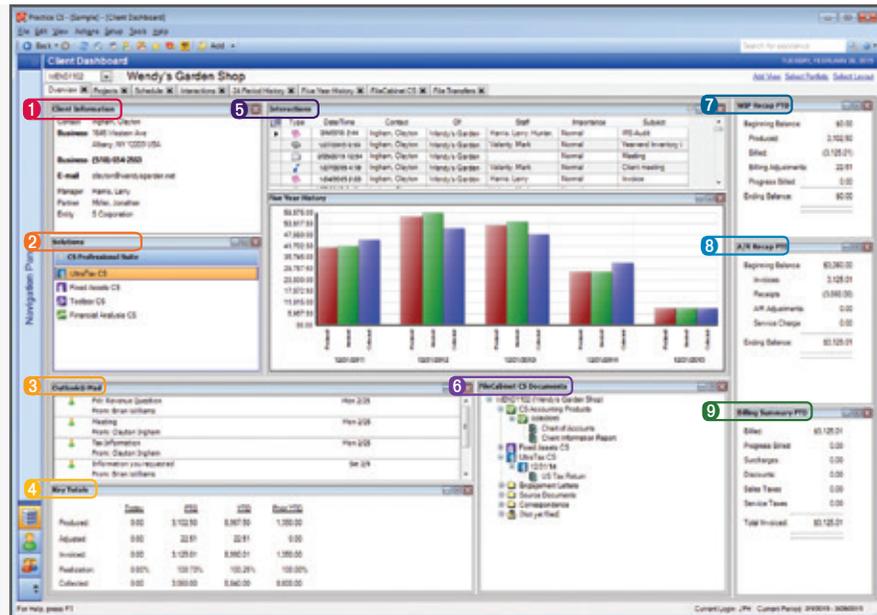
#### From the Solutions portlet, you can access:

- CS Professional Suite and any other programs that you use for each client.
- Any documents including Microsoft Office documents (e.g., Word and Excel® files).
- Shortcuts to frequently accessed websites or integrated online resources, such as Checkpoint®.

Using Practice CS in combination with the Client Management module (see pg. 16) ensures that you have the most current client information at your fingertips—enhancing your overall workflow. For example, from the Client Dashboard, you can display the Client Management Interactions portlet to create a comprehensive view of all interactions associated with a given client—including phone messages, emails and notes.

#### THE CLIENT DASHBOARD—YOUR CLIENT INFORMATION AT A GLANCE

- 1 Access client profile information.
- 2 Access key software and resources for each client.
- 3 View email messages specific to the client you have open.
- 4 View key production invoice and collection totals.
- 5 View all interactions associated with a given client.
- 6 Access FileCabinet CS and/or GoFileRoom documents related to the selected client.
- 7 See a Work in Process Recap.
- 8 See an Accounts Receivable Recap.
- 9 See a Billing Summary.



# STAFF DASHBOARD

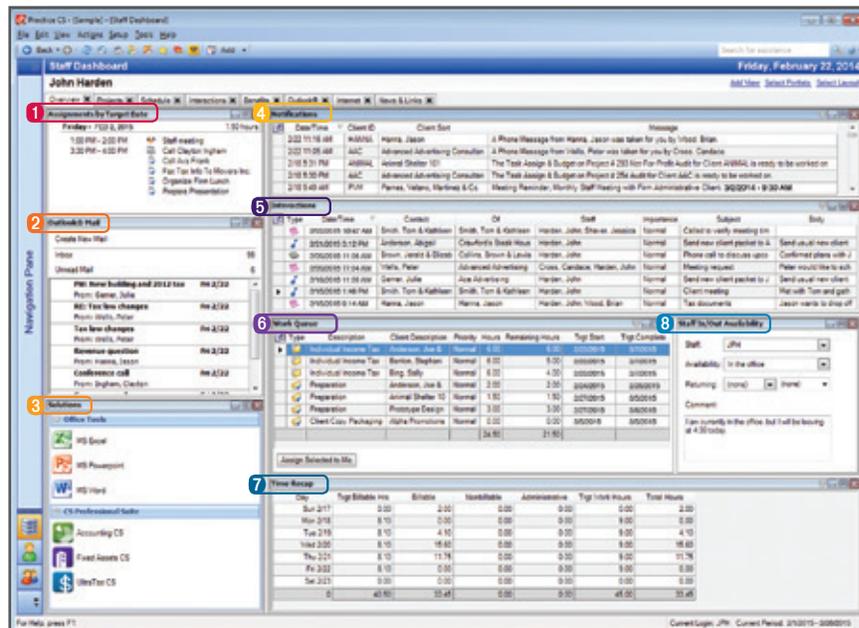
## Perform All Day-to-Day Tasks from a Single Location

The Staff Dashboard is designed to work seamlessly with all of your firm’s applications, such as Microsoft Outlook Mail, Calendar and Tasks, to provide a convenient workflow hub for your staff. The Staff Dashboard makes it easy for you and your staff to perform all of your daily tasks from one centralized location, rather than having to navigate multiple programs.

**Your staff can customize the dashboard to their specific needs and refer to it to handle a variety of tasks, including:**

- View Outlook Calendar, Mail and Tasks.
- View a list of outstanding projects and tasks.
- View a schedule with assigned projects and tasks and Outlook appointments.
- Access FileCabinet CS documents (if licensed).
- View information for entered time.

Using Practice CS in combination with the Project Management module (see pg. 15), you can further streamline workflow. From the Staff Dashboard, your staff can view up-to-the minute project information. For example, the Notifications portlet displays key information for staff, such as assigned projects and tasks, approaching deadlines or when client information has been received.



THE STAFF DASHBOARD—

- 1 View a complete schedule, including Outlook appointments.
- 2 Link directly to your Outlook email.
- 3 Access key software and resources in the Solutions portlet.
- 4 View critical notifications.
- 5 View all interactions for the selected staff.
- 6 View staff work queue.
- 7 View a time recap of your billable, nonbillable and administrative time totals.
- 8 Use the Staff In/Out Availability portlet to enter your availability, so other staff members can see when you'll be in or out of the office.

## PROGRAM SETUP

### Use a Standard Format or Customize to Meet Your Firm's Needs

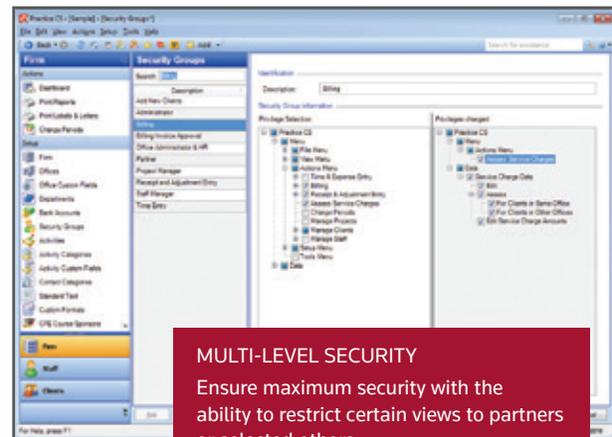
Dozens of flexible setup features enable you to tailor Practice CS to meet the needs of your firm—rather than changing your practice to fit your software. You can:

- Set up your own **user preferences** to specify how data entry fields are handled.
- Replace our default terms with your own **custom terminology**.
- Add your own **custom fields** for creating specific report groupings.
- Add **custom filters** that give you the ability to limit data to your own preferred criteria.
- **Access setup screens** whenever you need them by right-clicking and selecting from the context menu.
- **Share client contact information** with other CS Professional Suite programs to eliminate redundant data entry.
- **Track an unlimited number of contacts** for staff, clients and your offices.

## ASSIGN MULTI-LEVEL SECURITY

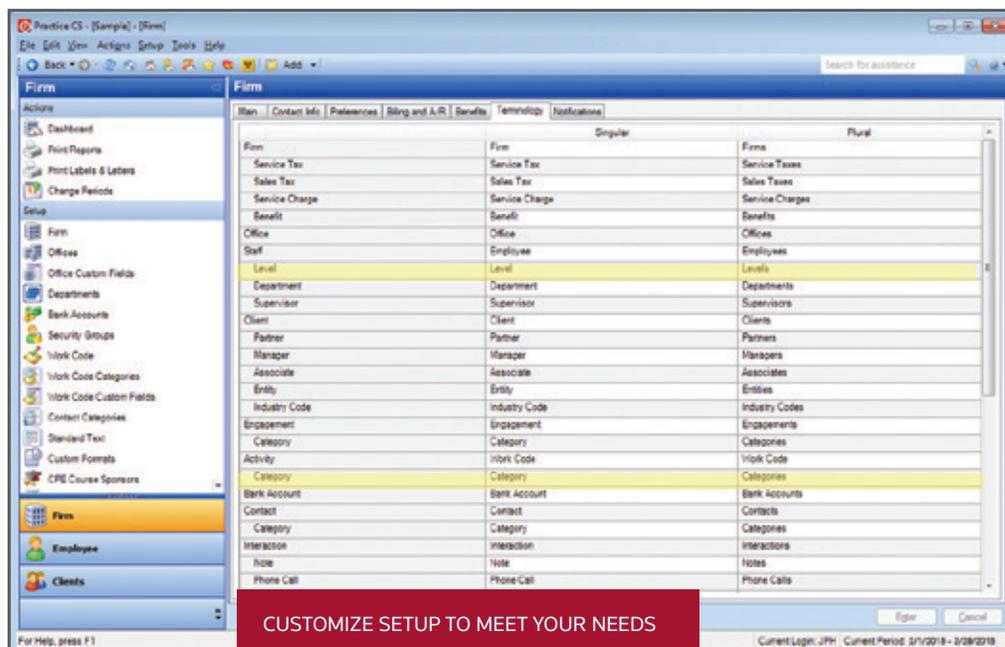
Set up multi-level security in Practice CS to meet your firm's specific needs. You can create specific security groups such as staff, managers, partners—or any designation you prefer.

This security feature enables you to control the level of information available to your staff, including what they can view on dashboards.



### MULTI-LEVEL SECURITY

Ensure maximum security with the ability to restrict certain views to partners or selected others.



### CUSTOMIZE SETUP TO MEET YOUR NEEDS

Practice CS enables you to modify the terminology used within the program to meet the unique needs of your firm.

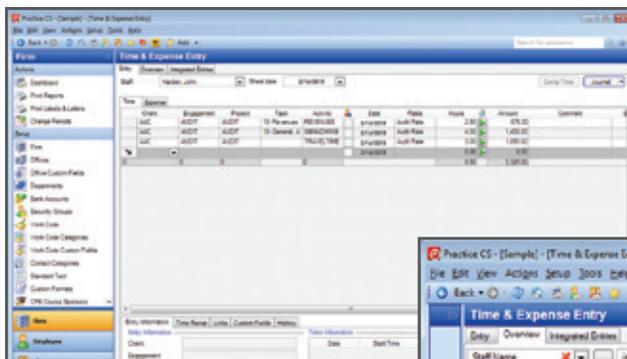
# TIME AND EXPENSE ENTRY

## Streamline Time Entry to Keep It Simple and Fast

Practice CS makes time entry fast and easy for your staff with tools to ensure that time is recorded accurately, so there's no time wasted correcting mistakes.

The advanced time and expense entry options in Practice CS enable you to:

- Use **one or more timers** to capture time as it happens. When a solution is launched from a project or task on the dashboard, Practice CS opens the client and starts the timer.
- Have virtually **unlimited filtering capabilities**, such as client, engagement, staff, date, activity and more.
- **Maintain an audit trail** of any changes made to time and expense transactions.
- **Change the order of time entry fields** to match your data entry needs.
- Customize the data entry screen with **flexible user preferences** that allow you to specify field defaults and skip or hide unused fields.
- **Enter negative WIP and expenses** for adjustment purposes.
- Select from **two input screen views**—one providing a single-sheet entry style that separates time and expenses and the other allowing entry across multiple sheets for both time and expenses.
- Add comments or notes for the biller with **convenient comment fields** that are available within each entry.
- **Enter time in minutes or hours** depending on your user preference settings.
- **Track time with a desktop timer** that appears on top of any other applications you have open.
- **Print the Time Entry Journal** for the current timesheet, which can be used for payroll purposes.
- Allow staff to **enter time remotely** even when not connected to the Internet.

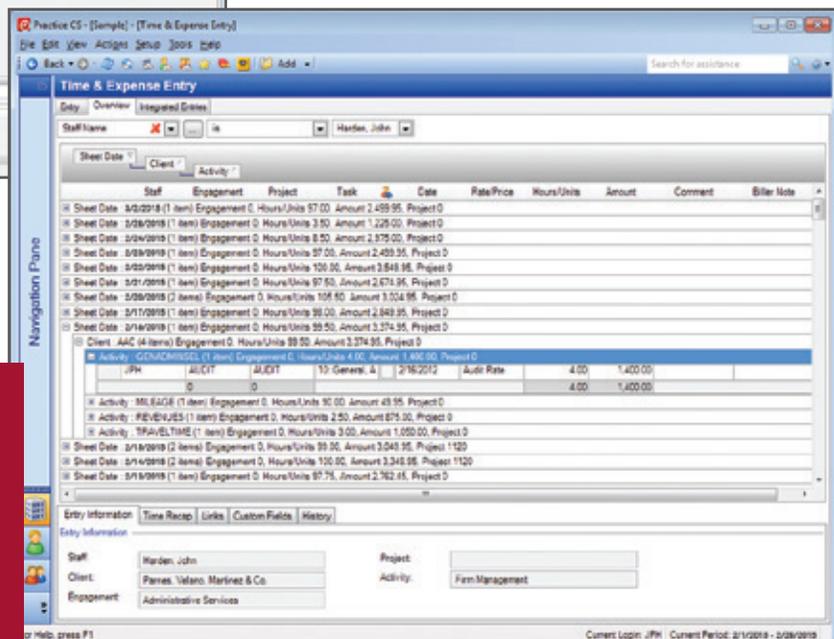


### TIME & EXPENSE ENTRY SCREEN

This data entry screen is the primary screen that your staff will use to enter their time and expenses.

### OVERVIEW TAB

Use the Overview tab to enter time and expenses for multiple staff or to quickly review many transactions for accuracy prior to billing. Also use this tab to quickly group and filter entries for different views.



"The best thing about Practice CS is that we can bill immediately because our staff accountants fill out timesheets as they are working."

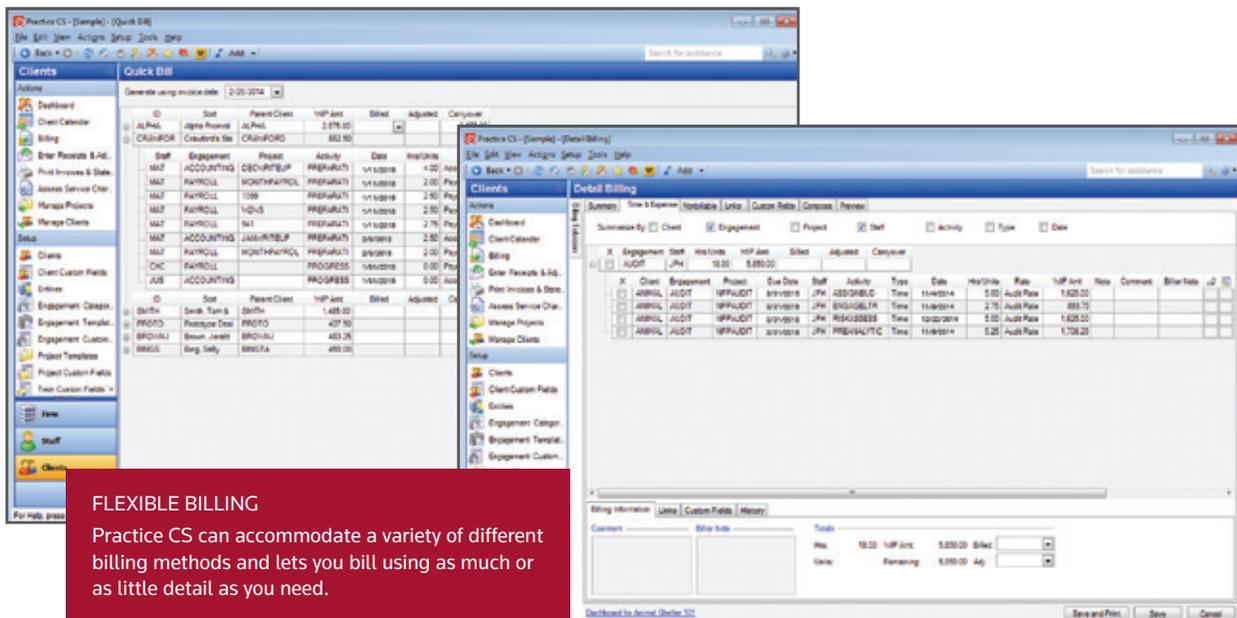
– Diane Siriani, MI

# BILLING

## Maximize Your Time and Profits with Efficient Billing

The billing system in Practice CS is comprehensive yet flexible enough to handle everything from basic billing functions to complex billing scenarios. You can:

- Select from four different billing methods, including:
  - **Detail Billing**—Bill clients at detail or summary level.
  - **Quick Bill**—Bill multiple clients for specified amounts on a single screen.
  - **Standard Bill**—Bill multiple clients for the standard WIP amount with a single mouse click.
  - **Zero Bill**—Bill selected clients' engagements at zero.
- Use the **Smart Bill** feature to bill multiple time and expense entries at one time with automatic allocation of billing and adjustment amounts.
- **Bill clients at your convenience** as often as you choose, by any method you prefer.
- **Bill by project, activity, staff or individual WIP item.**
- Use the **powerful filtering capabilities** in the selection screen to easily select which clients to bill.
- Use the **optional review feature** to approve and post invoices.
- Add an **invoice note** for future reference or staff review.
- **Create a single invoice for a parent client** when a client family is selected.
- Use the Compose tab to **make changes to the detail section** of an invoice, including:
  - Adding new rows with or without sub-rows
  - Adding free-form text
  - Deleting unwanted rows
  - Changing dollar amounts to reflect detail
- **Output invoices to multiple formats**, including NetClient CS, FileCabinet CS, GoFileRoom, Adobe® Acrobat® PDF, HTML, Rich Text Format, Text, Tagged Image File, Microsoft Excel and email.
- **Recurring billing** easily generates recurring invoices for customers setup with predetermined value based fee structure.
- **Create progress billing** so client invoices can be generated for the work before time and expenses are entered.

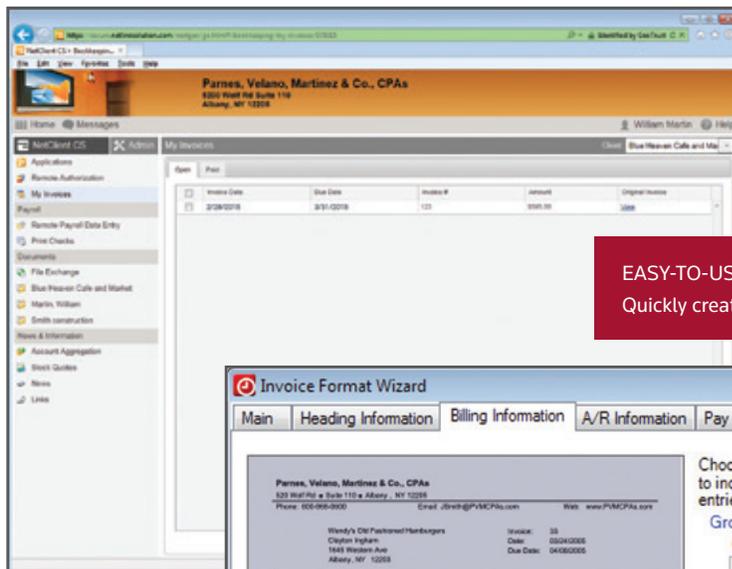


# INVOICES AND STATEMENTS

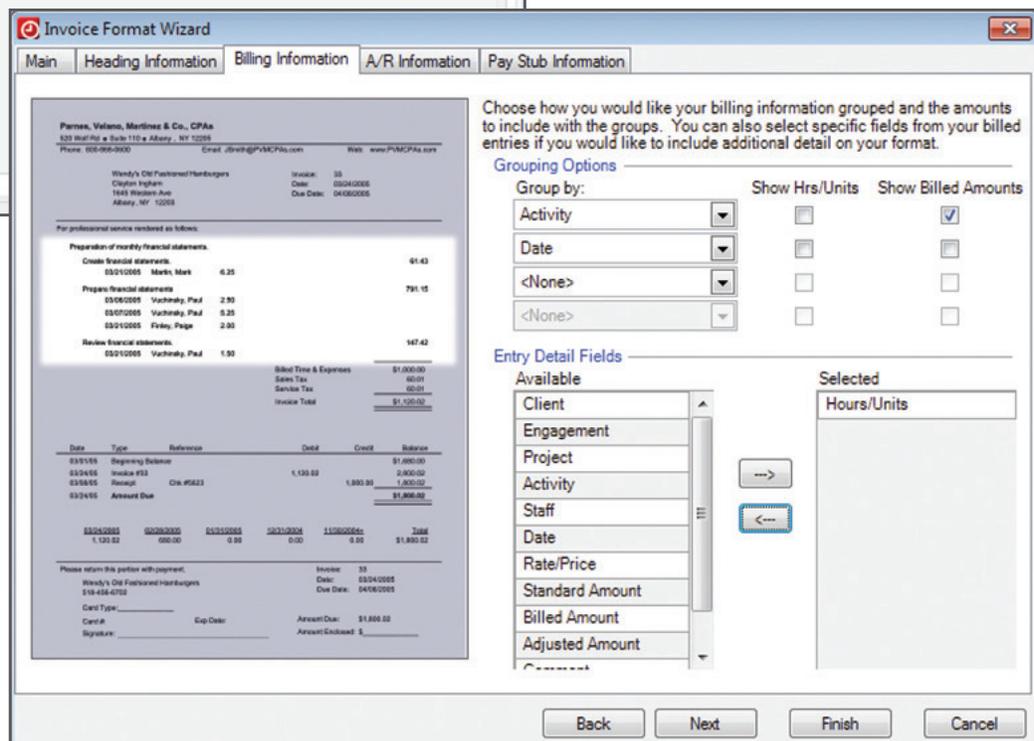
## Use Fast, Easy Invoice and Statement Formatting

The flexible Invoice and Statement Format Wizards in Practice CS make it easy to create invoices and statements for your clients in just minutes. You can:

- **Quickly set up your invoices or statements** using the easy-to-use formatting capabilities that are built into the program.
- **Control the level of detail** you show your clients using flexible grouping capabilities.
- Easily **add A/R Aging, Ledger and Recap** sections as needed.
- **Add dunning messages** that allow you to display previous balance reminders to your clients based on the age of their outstanding balance.
- **Include a pay stub** at the bottom of your invoice.
- Add a **technology surcharge** or a **discount** to invoices.
- Make **invoices available to clients via their NetClient CS portals** where they can view and pay the invoices online using credit cards.



**EASY-TO-USE INVOICE AND STATEMENT WIZARD**  
Quickly create invoices and statements that meet your specifications.





# CUSTOM FORMAT DESIGNER

## Design The Reports, Invoices, Statements, Labels, and Letters Needed For Your Firm

Custom Formatting is built into Practice CS to give you the flexibility you need to produce communications quickly and easily. With the easy-to-use custom formatting options, Practice CS allows you to create and modify existing standard formats, including content, layout and appearance and lets you create new invoices, statements, reports, labels and letter formats to meet the daily needs of your firm.

The Custom Format Designer makes it easy to customize layouts and add rows, columns and information for the presentation you desire.

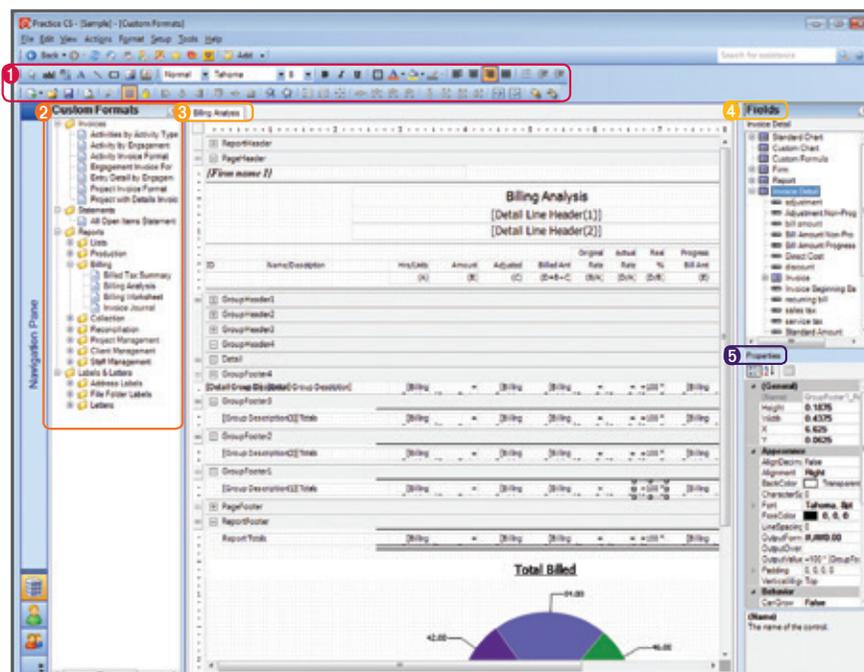
### The Custom Format Designer allows you full control to:

- Click and drag from a list of available fields and properties.
- Design multiple items simultaneously with the tabbed view.
- Control formatting options for fonts including size, color, bold, italics, strikeouts and underlining.
- Use Rich Text with additional formatting.
- Add lines, photos, logos and watermarks.
- Preview the item you are designing with live data as you work.
- Import and export formats.
- Pull custom fields into a custom format.
- Build calculated totals based on multiple fields.
- Include a visual representation of your data by adding customized charts to custom and standard reports using the Charts Wizard.

## CUSTOM FORMULA EDITOR—SHOW WHAT YOU WANT, THE WAY YOU WANT IT

The Custom Formula Editor lets you add calculated fields to custom formats. This editor makes it easy to modify calculations that are critical to analyzing procedures. You can:

- Select fields and enter amounts to create custom formulas.
- Add, subtract, multiply, divide and create conditional expressions.
- Save your custom formulas for use with other reports.



### CUSTOM FORMAT DESIGNER — EASY-TO-USE TOOLS FOR CREATING REPORTS AND COMMUNICATIONS

- 1 Familiar formatting controls allow you to change font and size, as well as add shapes and pictures.
- 2 Access the standard list of documents for customization.
- 3 Tabbed view allows you to customize multiple documents simultaneously.
- 4 Access a list of available fields for easy drag and drop into the document you are creating.
- 5 Set properties for the printing, appearance and other customizable properties of a document.

# ACCOUNTS RECEIVABLE PROCESSING

## Stay on Top of Your Cash Flow

Practice CS can help you maintain accounts receivable quickly and easily, enabling you to:

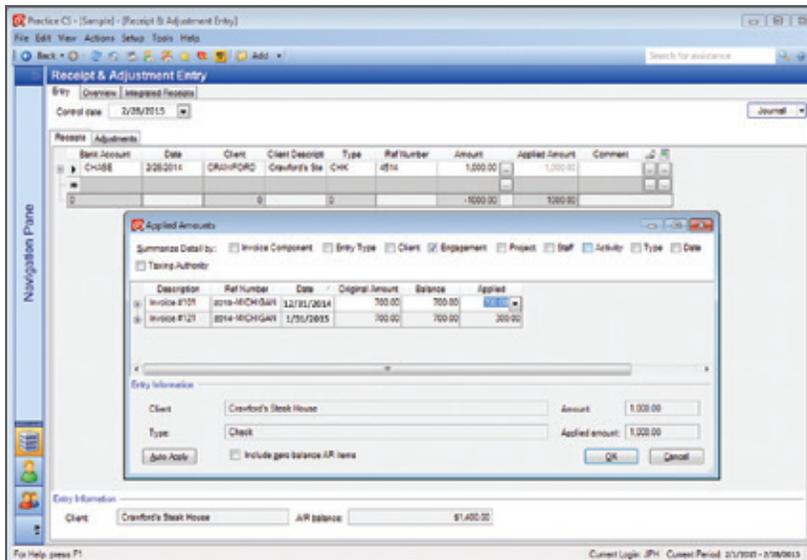
- Enter receipts and apply them manually or automatically to outstanding balances.
- Enter different adjustment types, including credit memo, credit card return, debit memo, non-sufficient funds and write-offs.
- Select from two different entry styles when entering receipts and adjustments—you can enter daily or in overview mode that displays multiple dates.
- Use the optional review process to require that all entries be approved and posted before inclusion in firm reporting, invoices and statements.
- Print a journal of receipts and adjustments from the entry screen.
- Create service charges for overdue accounts.
- Send customized statements to clients showing the status of their accounts.
- Use a secure online NetClient CS portal, to allow clients to pay invoices by credit card; the payments are automatically transferred to Practice CS receipt entry.

## NETCLIENT CS PORTALS EXPAND ONLINE CLIENT COLLABORATION

You can quickly and easily create private, secure client portals in Practice CS to improve the service experience for your clients and save time for your firm. You can transfer files back and forth, request files, create new portals, offer your clients the option to provide their signatures electronically and more.

“Complete practice management, which is supported with Practice CS, has become a core element within accounting firms. The profession has moved well beyond the need for just time and billing and requires aggregate, real-time information at our fingertips. Whether it is time and billing, comprehensive reporting or the status of client projects...I can access it all, immediately, with Practice CS.”

– Darren Root, IN



### QUICK RECEIPT APPLICATIONS

Practice CS makes it easy to quickly apply amounts to specific invoices. In the Applied Amounts dialog, you can use the Applied field to specify amounts to be applied to each outstanding invoice, or click the Auto Apply button to apply the adjustment automatically to the oldest invoices first.

# PROJECT MANAGEMENT

## Manage Your Firm's Workflow

With the optional add-on capabilities of the Project Management module, you can track and monitor due dates and manage and track your firm's projects and tasks right from your own desktop—giving you unprecedented control over your office workflow. You can also give your staff (via their Staff Dashboard) the tools to efficiently manage their individual responsibilities.

### Using Practice CS with Project Management, you can:

- Save time by setting up **project templates** that hold default information for project creation.
- **Import project templates** from a pre-defined list for quick setup.
- Set up **notifications to inform staff** members when client information for a project has been received, assignment changes are made or when due dates have been changed or extended.
- Control how recurring projects should be generated with **flexible project generation**.
- Create **user-defined recurrences**.
- Enable staff to **manage project responsibilities** from the Staff Dashboard by viewing assigned projects and tasks.
- **View Outlook appointments, tasks, projects and project tasks** in an Outlook-style calendar.
- Launch applications needed to complete projects from within Practice CS simply by clicking a project or task solution to **have your work timed automatically**.
- **Track actual vs. budget information** to determine how your staff is progressing on a project.
- Use the Manage Projects screen to **update project and task information**, assign work and review your own workload.
- **Complete projects and tasks automatically** in Practice CS via UltraTax CS event status integration and move to the next step on a routing list.
- Integrate projects with workflow items in FirmFlow, so you can centralize and manage all client and internal processes across the firm.
- **Group/filter reports, enter time/expense and bill clients** by project.
- Track additional data on projects and tasks using an **unlimited number of custom fields**.
- Use the **“links” capability**, to associate files, folders, web pages and FileCabinet CS and GoFileRoom documents with projects and tasks.

### Available Project Management reports include:

- List of Project Templates
- Project Budget to Actual
- Project Listing
- Project Tracking
- Routing Sheet
- Task Budget to Actual
- Task Tracking



### PROJECT MANAGEMENT

The Manage Projects screen gives you control over the workflow of your entire firm. The Staff Dashboard allows your employees to view their own projects and launch the software associated with a project or task.

# CLIENT MANAGEMENT

## Access Up-to-the-minute Information on All Your Clients From One Location

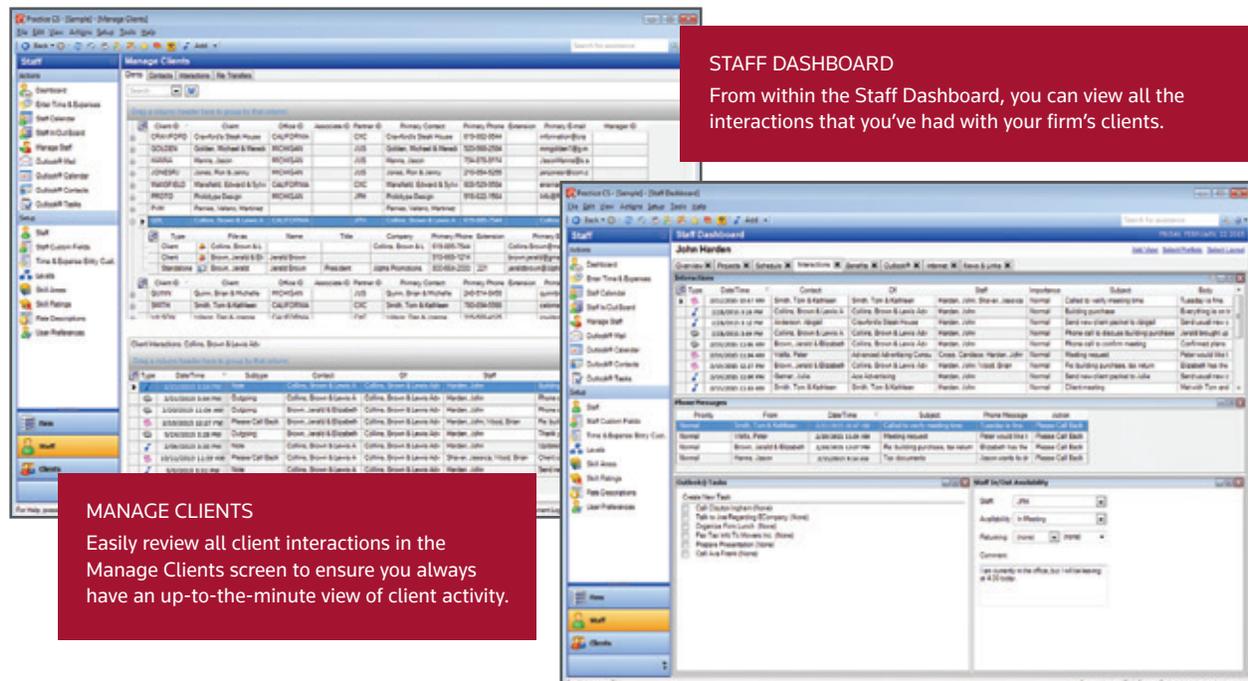
By always keeping the most updated client information at your fingertips, the optional add-on Client Management module features provide CRM capabilities that tighten your relationships with clients and prospects and enable you to offer better service. Because you communicate in many ways, including phone calls, emails, invoices and face-to-face contact, a system that tracks every client interaction and monitors every client activity is a must. Client Management lets you logically organize, store and access all client interactions in a single location for quick and efficient review—by anyone on your staff, at any time.

### Using Practice CS with Client Management, you can:

- **Customize your view of client and contact data** to meet your firm's specific needs.
- **Record notes** of every client interaction, including phone calls, emails, billing, or face-to-face meetings.
- **Access a contact list** and view information for all contacts at one time.
- **Synchronize contact information in real time with Outlook**, offering you the most up-to-date contact information in both applications.
- **Automatically track time on phone calls**, which can be invoiced with other billable time.
- **Record and track prospects won/lost information**, which allows you to determine why you are winning or losing prospective clients.
- **Track how new clients are referred** to your firm.
- **Generate virtually any report** grouped by referral source, giving you a complete picture of referral activity.
- **View interactions by client, contact, or staff** to stay apprised of all firm activity.
- **Record phone messages**, which show up on the Staff Dashboard and send a notification, providing a digital record of all phone messages.
- **Print reports of all historical client and contact activity** for quick, efficient review.
- **Seamlessly import client notes** from your Accounting CS software.
- **Send or receive files securely** with the option to request an electronic signature from your client via an easy-to-use file transfer feature that connects directly to our NetClient CS portals.

Available Client Management reports include:

- Clients Won
- Clients/Prospects Lost
- Interaction Listing



**STAFF DASHBOARD**  
From within the Staff Dashboard, you can view all the interactions that you've had with your firm's clients.

**MANAGE CLIENTS**  
Easily review all client interactions in the Manage Clients screen to ensure you always have an up-to-the-minute view of client activity.

# STAFF MANAGEMENT

## Manage Staff Benefits, Targets and Schedules From One Location

The Staff Management module can help firms of all sizes become more efficient and optimize current and future staff performance. With Staff Management, you can quickly and easily manage and track staff benefits and comp time, staff budgeting and targets, staff scheduling and more—all with total control.

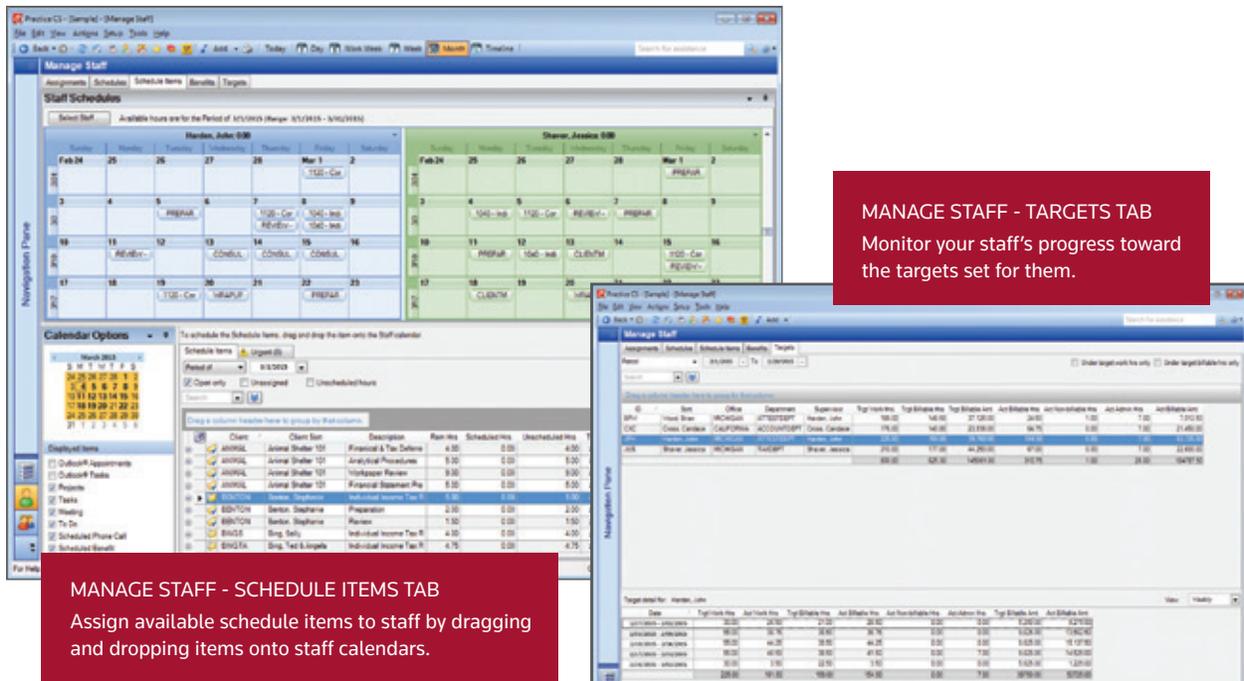
Using Practice CS with Staff Management, you can:

- **Maintain staff benefits automatically** with program-generated accruals, automated balance reductions via time entry and automatic adjustments for annual carryover rules.
- **Track accruable benefits**, comp time and firm holidays.
- **Set accrual allowances to be fixed** based on months of employment or based on staff levels.
- **Provide staff with benefit balances**, projected accruals and “to use” hours based on carryover rules.
- **Enable supervisors to view time-off requests** and approve or deny them.
- **Set up per-staff targets** and view targets versus actual results.
- **Manage staff assignments**, including phone calls, benefits, meetings and to-do items by ranking them in the order you want the assigned staff to work on them.
- **Define staff qualifications** for schedule items and work queues.

- **View staff workloads and drag and drop schedule items** onto Staff Calendars to assign and schedule additional work.
- Define the criteria that **make schedule items urgent** and choose to view these separately.
- **Enable staff to view their schedules**, workloads and items in the work queue.
- **Set reminders** for all schedule items.

Available Staff Management reports include:

- Calendar Listing
- CPE Course Cost Analysis
- CPE Course Credit Listing
- Schedule Item Detail
- Schedule Item Listing
- Staff Assigned Summary
- Staff Benefits Summary
- Staff Capacity Analysis
- Staff Schedule Summary
- Staff Target Summary



## MOBILE CS

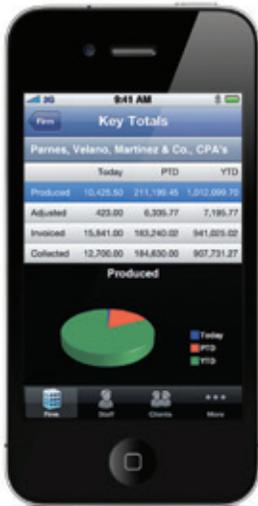
### On-The-Go-Access to Your Firm Data on Your iPhone®, iPad® and Android™ Device

Mobile CS™ is an app for your mobile device that lets you access the software data you use to make decisions and run your practice every day. It's the easy option to get important firm information on your Apple® iPhone, iPad, iPod touch® or Android device. And, it's always available, from anywhere.

On-the-go information—like helpful client and staff data and key firm data like WIP and A/R—lets you review client interactions before an important meeting, check staff availability while you're out of the office, view the status of a project and much more.

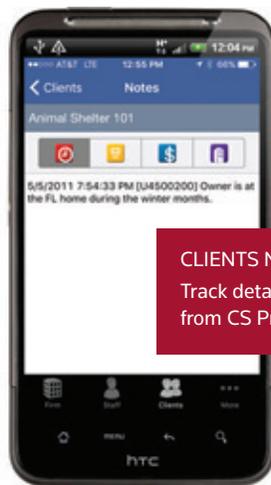
#### With Mobile CS, you can:

- **Access Key Firm-Level Data**—You see real-time data including what's happening with firm operations, staff projects and client status. Staying connected helps you make sure work is getting done efficiently and your firm is running at full speed.
- **View Client Contact and Interactions; Enter Time, Expenses and More**— Quickly look up client contact information including addresses, phone numbers, email addresses and maps; access a log of client interactions to see which staff have been talking with your client; see account activity, track projects and view WIP and A/R. You can also enter time and expenses, track mileage, track receipts and time outgoing calls. All this data flows into Practice CS to help you capture the most billable time possible.
- **Manage Your Work On-the-Go**—Mobile CS helps you and your staff keep track of assigned projects and task responsibilities, all in a convenient list. It's a great way to stay on top of your workload and view weekly Time Recaps including billable, nonbillable and administrative time.



#### FIRM KEY TOTALS

Review project, adjusted, invoiced and collected amounts for today, period-to-date and year-to-date, including pie charts.



#### CLIENTS NOTES

Track details and view integrated client notes from CS Professional Suite products.

## FLEXIBLE LICENSING OPTIONS

### 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—LEASE VS. BUY

- **Software as a Service (SaaS)**—Our newest software delivery option offers a flexible, affordable way to manage your entire practice, making Practice CS and other CS Professional Suite software accessible to your firm 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, as needed, 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 Practice CS and the CS Professional Suite.

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 the Buy vs. Lease section of our website at:

**[Tax.ThomsonReuters.com/HostedOptions](https://www.thomsonreuters.com/HostedOptions)**.



## 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](https://tax.thomsonreuters.com/CS-SYNERGY). Professional accreditation is available.

For more information on training and consulting or to register for courses, visit

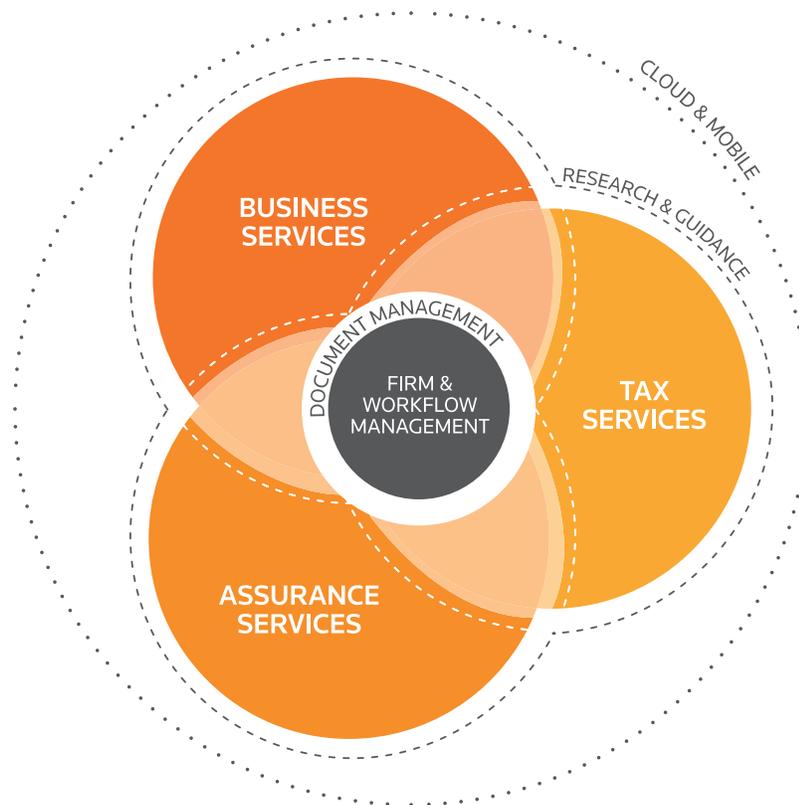
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# INTEGRATED SOLUTIONS

## CS PROFESSIONAL SUITE®



### **BUSINESS SERVICES**

Accounting CS®  
Accounting CS Client Access  
Accounting CS Payroll  
myPay Solutions®  
Workpapers CS™

### **TAX SERVICES**

Fixed Assets CS®  
GoSystem® Tax RS  
Planner CS®  
ToolBox CS®  
UltraTax CS®

### **ASSURANCE SERVICES**

AdvanceFlow®  
Engagement CS®

### **DOCUMENT MANAGEMENT**

FileCabinet CS®  
GoFileRoom®

### **FIRM & WORKFLOW MANAGEMENT**

FirmFlow™  
Practice CS®

### **CLOUD & MOBILE**

**CLOUD**  
NetClient CS®  
SaaS for the CS Professional Suite  
Virtual Office CS®  
Web Builder CS®

**MOBILE APPS**  
Mobile CS®  
myPay Solutions  
NetClient CS®



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