SaaS for CS Professional Suite

Tax and accounting in the cloud — a total software leasing solution

SaaS (Software as a Service) Thomson Reuters® CS Professional Suite is an online software delivery method that enables any size firm to lease the entire award-winning CS Professional Suite (plus Microsoft® Office and Microsoft Exchange®), without having to make large, up-front investments in software license purchases. This software leasing option also lets you gain the full benefits of software integration for expanding your firm's services and streamlining productivity in your practice.

Significant time and cost savings

There are countless benefits to be gained from moving your firm to the cloud with SaaS for CS Professional Suite, including:

- The convenience, time savings, and cost efficiencies of a web-hosted solution
- The smart economics of leasing your software — where you pay for what you use based on staff roles and needs and your firm's services
- The data-sharing enabled by seamless integration across CS Professional Suite applications

With SaaS for CS Professional Suite you can:

- Securely access your tax and accounting software online 24/7
- Budget your monthly/annual expenditures precisely
- Reduce IT costs

And with the CS Professional Suite as the foundation of your practice, you can combine seamless integration with paperless capabilities and the web for amazing results. Specifically, you'll be able to streamline your processes, accelerate firm productivity, gain the flexibility and capacity to add other services for expanded growth and profit, improve client service, and strengthen client ties.

Budget-friendly software

When you lease tax and accounting software in the cloud, you not only get the conveniences of a web-hosted environment and the time and cost savings enabled by the integrated CS Professional Suite but also considerable economic advantages.

With SaaS for CS Professional Suite, your monthly lease payment is:

- Need-Based — to reflect your actual staff roles and firm services
- Scalable — to allow changes based on your need, growth, and seasonal fluctuations
- Predictable — to enable annual budget forecasting

Proven cloud computing experience

We've been offering web-hosted applications for over two decades. Every day, thousands of firms and tens of thousands of individual users rely on us to deliver their software in the cloud.

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Backed by Thomson Reuters

The tax and accounting business of Thomson Reuters — the world's leading source of intelligent information for businesses and professionals — provides technology, software, and information solutions to accounting, tax, and corporate finance professionals in accounting firms, corporations, law firms, and government. With our solid product lines, network of data centers, and proven online software delivery options, we've been providing stable and secure information solutions to our customers for more than 40 years.

Getting started with SaaS

Step 1 — Choose your SaaS profile

SaaS for CS Professional Suite offers flexible pricing models. Choose from profiles that can be scaled up or down on a monthly basis, add and remove staff (including seasonal) as your firm grows, and modify staff access as firm needs change.

Each SaaS Profile includes the CS Professional Suite products indicated with a check mark.

Step 2 — Choose your onboarding and training package

All purchases include an onboarding learning plan to help get you started. You may choose to purchase more courses to enhance your experience and help with additional setup. For help determining which package will best suit your firm's needs, contact us at **800-968-8900.**

SaaS profiles of use				
Product	**Full Service**	**Tax**	**Accounting**	**Admin**
UltraTax CS (Includes PRP and ELF fees)	✓ [4, 5]	✓ [4, 5]		
Accounting CS	✓		✓	
Accounting CS Payroll	✓		✓	
Workpapers CS [3]	✓ [1]	✓	✓ [1]	
Fixed Assets CS	✓	✓	✓	
Planner CS	✓	✓		
Practice CS	✓	✓	✓	✓
FileCabinet CS [2]	✓	✓	✓	✓
Microsoft Office w/Exchange [2]	✓	✓	✓	✓

[1] Workpapers CS is accessible via the Full Service and Accounting profiles in the Accounting CS program.

[2] Mobile phone synchronization is included for any phone that has Active Sync (like iPhone and Android devices).

[3] Source Document Processing (SDP) is available for an additional fee on a per client, per year, or unlimited license basis.

[4] Electronic signature capabilities are available for engagement letters, consent forms, and 1040 IRS Form 8878/8879. In addition, UltraTax CS eSignature capabilities are available for business engagement letters and consent forms, bank account verification worksheets, and FinCEN Form 114a. A per document/package of documents fee will apply to each successfully eSigned engagement letter, consent form, verification worksheet, and FinCEN Form 114a; a per document/package of documents fee will apply to each successful KBA (Knowledge-Based Authentication) signed Form 8878/8879.

[5] 1040 and Business Web-Based Organizers are included with NetClient CS. If you do not have NetClient CS, the following additional per-client fees may apply: posting and retrieval for the 1040 Organizer and posting for the Business Organizer.

To learn more about **SaaS for CS Professional Suite**, contact us at **800-968-8900**.

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