

PRODUCT PROFILE

SAAS FOR CS PROFESSIONAL SUITE®



TAX AND ACCOUNTING IN THE CLOUD – A TOTAL SOFTWARE LEASING SOLUTION

SaaS (Software as a Service) for 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 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 & COST SAVINGS

There are countless benefits 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, you also get 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 nearly two decades. Every day, thousands of firms and tens of thousands of individual users rely on us to deliver their software in the cloud.

BACKED BY THOMSON REUTERS

The Tax & 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 30 years.

LEARN MORE — For more information about SaaS for CS Professional Suite, including pricing, call us at **800.968.8900**, email cs.sales@tr.com or visit tax.tr.com/saas

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GETTING STARTED WITH SAAS

STEP 1 - CHOOSE STANDARD, SELECT OR PREMIUM

There are three initial, one-time purchase options for SaaS for CS Professional Suite. For help determining which package will best suit your firm's needs, call us at 800.968.8900.

STANDARD

- Setup and configuration of your firm and applications in our secure data centers
- UltraTax CS Welcome Services Program, including free data conversion
- Implementation Planning Service
- Web Services Welcome Services Program, including:
 - Walkthrough of data migration and setup
 - Administrator procedural instructions and overview
- NetStaff CS™ On-Demand Training module

SELECT

- Setup and configuration of your firm and applications in our secure data centers
- UltraTax CS Welcome Services Program, including free data conversion
- Implementation Planning Service
- Web Services Welcome Services Program, including:
 - Walkthrough of data migration and setup
 - Administrator procedural instructions and overview
- NetStaff CS On-Demand Training module
- Training (Specific courses and methods to be determined during implementation planning session)

PREMIUM

- Setup and configuration of your firm and applications in our secure data centers
- UltraTax CS Welcome Services Program, including free data conversion
- Implementation Planning Service
- Web Services Welcome Services Program, including:
 - Walkthrough of data migration and setup
 - Administrator procedural instructions and overview
- NetStaff CS On-Demand Training module
- Training (Specific courses and methods to be determined during implementation planning session)
- Six month check-in

STEP 2 - CHOOSE YOUR PROFILE

SAAS PROFILES OF USE

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.

| SAAS PROFILES OF USE | | | | |
|---|------------------|------------------|----------------|-------|
| PRODUCT | FULL SERVICE | TAX | ACCOUNTING | ADMIN |
| UltraTax CS® (includes Fed/State PRP & ELF fees) | ✓ ^{5,6} | ✓ ^{5,6} | | |
| Accounting CS® | ✓ | | ✓ | |
| Accounting CS Payroll | ✓ | | ✓ | |
| Workpapers CS™ | ✓ ¹ | ✓ | ✓ ¹ | |
| Fixed Assets CS® ⁴ | ✓ | ✓ | ✓ | |
| Planner CS® | ✓ | ✓ | | |
| Engagement CS® ² | ✓ | ✓ | ✓ | |
| ToolBox CS® | ✓ | ✓ | ✓ | ✓ |
| Practice CS® | ✓ | ✓ | ✓ | ✓ |
| FileCabinet CS® ⁴ | ✓ | ✓ | ✓ | ✓ |
| Microsoft Office w/Exchange ³ | ✓ | ✓ | ✓ | ✓ |

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

² Engagement CS is available upon request.

³ Mobile phone synchronization is available for any phone that has ActiveSync (like Apple® iPhone and Android™) for an additional fee.

⁴ Source Document Processing (SDP) is available for per client, per year or unlimited license. Check with your representative for pricing.

⁵ Electronic signature capabilities are available for engagement letters, consent forms and Form 8879.

⁶ 1040 and Business Web-Based Organizers are included with NetClient CS. If you do not have NetClient CS, Web-Based Client Organizers are available on a per-client basis. Check with your representative for pricing.

