FACT SHEET

PRACTICE CS® CLIENT MANAGEMENT MODULE

CS PROFESSIONAL SUITE®

A PRACTICE MANAGEMENT SYSTEM THAT HELPS YOU MANAGE YOUR PRACTICE

A leader among professional practice management systems, Practice CS offers a revolutionary "digital dashboard" approach that displays critical, real-time information about your staff, clients and firm. Serving as a workflow hub, Practice CS combines all of the tools and resources you need in one place to ensure that you're in complete control and managing your practice efficiently and profitably.

MANAGE ALL CLIENT ACTIVITY

Because you communicate with your clients in many ways, including phone calls, email messages, invoices and face-to-face contact, you need a tool that keeps track of every interaction and effectively monitors client activity.

The Client Management module meets all of your CRM needs and is one of the most powerful workflow tools within Practice CS. This easy-to-use, comprehensive client management system logically organizes and stores all client interactions in a single, customizable location—enabling you to record, access and monitor every detail of client activity in your office.

GIVE YOUR STAFF THE TOOLS THEY NEED

With the Client Management module, your staff can manage client activity and have the ability to:

- View the most up-to-date client and contact information.
- Record notes of every client interaction, including phone calls, email messages, billing or face-to-face meetings.
- Automatically time phone calls to track billable time for invoicing.
- Monitor the progress of referrals and prospects.
- Manage activity for all your firm's clients.

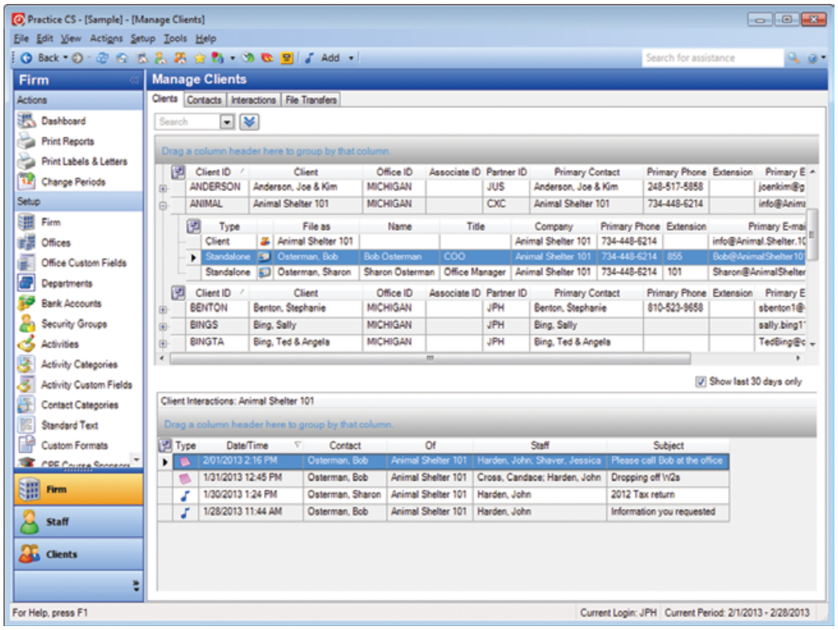
AVAILABLE CLIENT MANAGEMENT REPORTS

- Clients Won
- Clients/Prospects Lost
- Interaction Listing

MAKE WORKFLOW MORE EFFICIENT

The Client Management module helps you and your staff at every step of your workflow with the ability to:

- View interactions by client, contact or staff in order to stay apprised of all firm activity.
- Customize your view of client and contact data to meet your firm's specific needs.
- Access a Rolodex®-like view of contact information and see all contacts at one time.
- Synchronize contact information with Microsoft® Outlook®, so you have the most up-to-date contact information in both applications.
- Record and track prospects won/lost information, which allows you to determine why you're winning or losing prospective clients.
- Generate virtually any report grouped by referral source, for a complete picture of referral activity.
- View recorded phone messages on the Staff Dashboard.
- Print reports of all historical client and contact activity for quick, efficient review.
- Initiate secure file transfers between clients and firm. You must be licensed for NetFirm CS™ to perform this action.



MANAGE CLIENTS SCREEN

Gives you an up-to-the-minute view of client activity.

CLIENT MANAGEMENT MODULE

The Client Management Module can help you collaborate and track every activity detail so you always have the most updated information at your fingertips, and it can help you tighten your relationships with tax and accounting clients and prospects.

LEARN MORE — For more information about Practice CS the Client Management Module, visit **Tax.ThomsonReuters.com/PracticeCS**, contact us at **800.968.8900** or email **CS.Sales@ThomsonRetuers.com.**

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