FACT SHEET

PRACTICE CS® PROJECT 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 effectively.

MANAGE YOUR DAY FROM START TO END

One of the most powerful workflow tools within Practice CS is the Project Management add-on module. This easy-to-use, comprehensive project management system lets you manage and track your firm's projects and tasks right from your own desktop—giving you unprecedented control over the workflow in your office.

GIVE YOUR STAFF THE TOOLS THEY NEED

With the Project Management module, your staff can manage their own responsibilities with the ability to:

- Identify the tasks and time required to perform work.
- Track due dates.
- Control project workflow.
- Monitor staff performance.
- Manage progress for all your firm's projects.
- Integrate with the Staff Management module for complete scheduling capabilities.

ADD EFFICIENCY TO MANAGE EVERY PROJECT WITH EASE

The Project Management module helps you and your staff at every turn with the ability to:

- Save time with project templates that hold default information for project creation.
- Set up notifications to inform staff members when client information for a project has been received, assignment changes are made or important dates have been updated.
- Control how recurring projects are generated with flexible project generation.
- Create user-defined recurrences for recurring projects and set them to expire after a specified number of occurrences or on a specific date.
- Manage project responsibilities from the Staff Dashboard by viewing assigned projects and tasks.
- View Microsoft® Outlook® appointments, tasks and projects in an Outlook calendar-style interface.
- Launch applications needed to complete projects from within Practice CS.
- Click a project to have your work timed automatically and seamlessly integrated.

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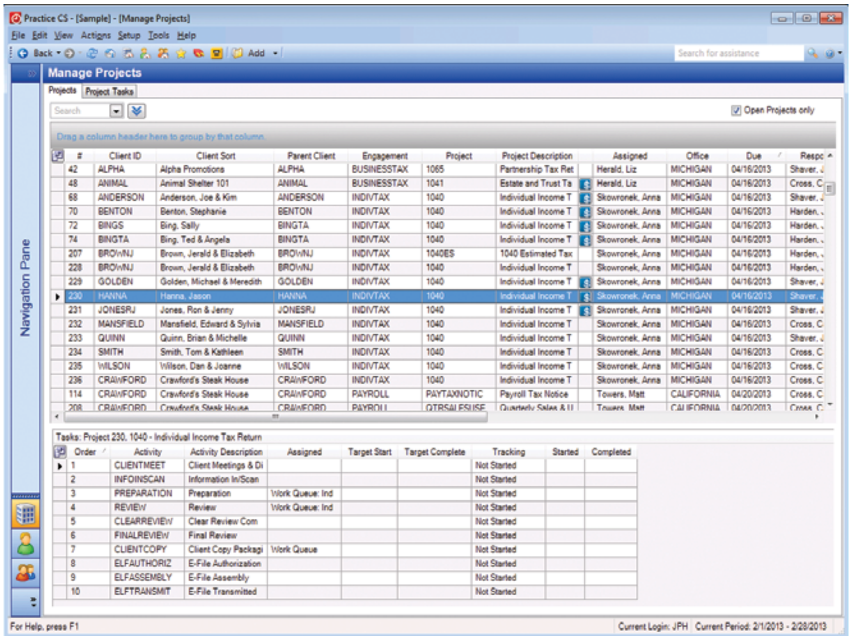

THE MANAGE PROJECTS SCREEN

Gives you control over the workflow of your entire firm.

ADD EFFICIENCY BY MANAGING EVERY PROJECT WITH EASE

(continued)

- Automatically complete projects and tasks in Practice CS from UltraTax CS®.
- Use Event Status integration with UltraTax CS and route projects step by step.
- Optionally integrate projects with workflow items in FirmFlow, so you can centralize and manage all client and internal processes across the firm.
- Track budget vs. actual information to determine how your staff is progressing on a project.
- Make adjustments to the current project's budget without affecting the budget of future projects.
- Use the Manage Projects screen to update project and task information, assign work and review your own workload.
- Assign multiple people to projects and tasks.
- Enter time and expenses by project.
- Bill clients based on projects.

AVAILABLE PROJECT MANAGEMENT REPORTS

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

The Project Management Module can help you track your firm projects and tasks from one location, keeping you fully informed and offering complete control over your workflow.

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

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