Professional Tax and Accounting Solutions
From Thomson Reuters

**Simple Workflow**
for Complex Processes
80% of accounting staff waste more than 30 minutes a day searching for information, and 60% of staff are spending more than an hour a day duplicating work.¹

Why Thomson Reuters?
That’s why tax and accounting professionals are turning to Thomson Reuters.

Firms that are inundated with manual processes are prone to inefficiencies and extra work. With professional tax and accounting solutions from Thomson Reuters, you can automate your workflow and do more in less time, with less impact on your accounting staff and less IT involvement around your software.

When information comes in your staff only has to enter data once, eliminating the re-keying of data and freeing up your staff to serve even more clients.

Thomson Reuters solutions make it possible for you to give clients what they want before they even know they need it. You’ll be more proactive with customers and potential customers as you deliver tools and services that enable new ideas and strategies for business growth and engagement.

These value-added services go beyond your customers’ immediate needs, developing deeper relationships built on trust. This leads to higher retention and satisfaction, since your clients enjoy a level of attention beyond their expectations. It also drives referral business, since happier clients tend to spread the word.

Simple Workflow for Complex Processes
Applications and services from Thomson Reuters are designed to work seamlessly together as an integrated system. Whether you choose just a few applications or all of them, your products share information and automate workflow to increase your firm’s efficiency and profitability — and raise the level of service for your clients.

¹Source: Practice CS Webcast: Discover how you can better track your business and manage your clients through Practice CS, August 2016
Integration story
Here’s an example of an integrated workflow process that illustrates how you can save hours and reduce administrative burden.

1. Your client enters source data with your client accounting program, which lets them view financial data in real time, enter transactions and perform everyday functions like check writing, payables, receivables and payroll processing.

2. You can immediately use the data across all functions in your accounting program and other applications — trial balance, payroll, financial reporting and more — because you take advantage of the web to share the same database.
   
   a. Manage, mark up and process your workpapers and source documents using your workpaper management software. Use source document processing to automatically name and organize your documents into the folder structure you’re familiar with in your tax program, and use source data entry to automatically transfer data to the tax software. Jump into relevant tax research along the way if you run into questions.
   
   b. Use Microsoft® Office integration to automate your Excel® worksheets so they’ll proforma and save you time each year. Make final adjustments in your trial balance program, then seamlessly export balances to your tax software in seconds.
   
   c. Process your clients’ payroll tax compliance, make adjustments, and create financial statements, W-2, 1099 and 1095-C forms — as well as year-end balance data — using your accounting software. Transfer it all directly into your tax program at tax time.

3. Post your client’s completed tax returns, reports, payroll and other deliverables to secure, private online client portals, where your client can access them anytime. On your end, all documents and data are stored securely in your document management program.

4. Manage employees and resources at every step of the process with your practice management software — and ensure your staff is always up to speed with extensive compliance and software training.

5. Invoice clients and collect credit card payments directly through your clients’ portal.
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Explore how you can save time with an integrated series of software applications that encompass every aspect of your firm’s operations — from collecting client data and posting finished tax returns, to ongoing practice and engagement management. Scan the codes to the right to read more about the ways our products and services blend scalable tax processing, audit and accounting workflow solutions with convenience, security and expertise you expect.

Accounting & Auditing
Accounting CS®
Workpapers CS™
AdvanceFlow®
bit.ly/acct-audit

Payroll Services & Software
Accounting CS Payroll
myPay Solutions®
bit.ly/payroll-svcs

Tax & Asset Management
UltraTax CS®
GoSystem® Tax RS
Fixed Assets CS®
Planner CS®
bit.ly/tax-asset

Client Portals & Websites
Web Builder CS®
NetClient CS®
Onvio Client Center
bit.ly/portals-websites

Document Management
Onvio™ Documents
GoFileRoom®
bit.ly/doc-mgmt

Hosted Options
Software as a Service (SaaS) for the CS Professional Suite
Virtual Office CS®
bit.ly/hosted-options

Firm & Workflow Management
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FirmFlow™
bit.ly/firm-mgmt

Research and Guidance
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