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# PRACTICE CS<sup>®</sup> CONVERSION SERVICE

## Information Kit for Conversions from Sage TimeSlips<sup>®</sup>

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This guide contains information for the Practice CS Data Conversion Service for Sage TimeSlips.

Thomson Reuters provides the Practice CS Data Conversion Service to convert your firm’s data quickly, smoothly, and accurately. This *Information Kit* explains the data conversion process in detail and provides specific information about converting from Sage TimeSlips.

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## How to use the Practice CS Conversion Service

1. Read this *Information Kit* carefully.
2. Prepare your Sage TimeSlips data and send the data to the Practice CS Data Conversion Service.
3. The Practice CS Data Conversion Team will convert your Sage TimeSlips firm data and return it to you in a converted Practice CS firm data package.

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## What to expect from data conversion

The overall objective of the Sage TimeSlips to Practice CS conversion process is to provide a comprehensive conversion of Sage TimeSlips data into Practice CS. However, due to software differences between Sage TimeSlips and Practice CS, some Sage TimeSlips data cannot be converted. **Therefore, you should not expect to exactly duplicate results from Sage TimeSlips using the converted data without adding or modifying the appropriate data in Practice CS.** See “Detailed information on items converted and not converted” starting on page 3 for a listing of items converted and not converted. Continue reading to learn details regarding the conversion process and the steps you will need to follow.

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## Understanding the conversion process

Because converting firm data files from Sage TimeSlips to the Practice CS format is a complex and time-consuming process, the Practice CS Data Conversion Team will convert the firm files for you. All you need to do is schedule a data conversion appointment, prepare your firm data, back up your firm data files, and send the data files to the Practice CS Data Conversion Team.

The Conversion Team will take your Sage TimeSlips data and transfer it to the Practice CS format.

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## Confidentiality

We acknowledge that your firm will be submitting data containing personal and financial business information. Thomson Reuters treats all data submitted as sensitive, confidential, and private. The Practice CS Data Conversion Team uses data submitted for conversions solely for data conversion purposes, in a secure environment, and does not retain any portion of this data for any purpose. For more information, you can access our Privacy Policy from the bottom of any page on our website, [CS.ThomsonReuters.com](http://CS.ThomsonReuters.com).

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## Steps for using the Practice CS Data Conversion Service

### Step 1: Read this Information Kit

Please read this *Information Kit* carefully. Information such as the items transferred during conversion will help answer your questions and let you know what to expect from the Practice CS Data Conversion Service.

### Step 2: Prepare your firm data

Your entire firm database will need to be sent for conversion. To find the location of your firm's database, open Sage TimeSlips and click File > Open Database. This information can also be found on the bottom left corner in the status bar when you have the database open in TimeSlips. For easier transmission of your data, it is recommended that you compress your data into a .ZIP file

Before sending the firm data, ensure that all time, invoice, and accounts receivable (A/R) entries are submitted and posted. Failure to do this will have an effect on the accuracy of the conversion.

### Step 3: Send your firm's data to Thomson Reuters

Secure data exchange (SDE) is a secure, electronic method for transferring data to the Conversion team using your CS website account. Information on how to access the SDE site is included in the Appointment Confirmation form sent during the appointment. Please be sure to keep a copy of the file(s) you submitted to us.

### Step 4: Receiving your converted data

Once the Practice CS Data Conversion Team receives your firm's data, we will process it promptly here at our corporate facilities in Ann Arbor, Michigan. Upon completion of the conversion, you will be contacted by the Practice CS Data Conversion Team. The converted data will be returned to you via the SDE site in Practice CS backup format. This is the same SDE site used to submit your data.

Items on the SDE site may include some or all of the following items:

- The original backup of firm data you submitted for conversion.
- The backup of converted Practice CS firm data.
- Practice CS Data Conversion Service document(s).
- Conversion data transfer report.
- Any additional information you need to know regarding your firm data.

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## Backup instructions for Sage TimeSlips

The Practice CS Data Conversion Team needs a copy of the data files from within Sage TimeSlips. The default directory is as follows:

**C:\Program Files\Timeslips\DataXX** or **C:\Program Files (x86)\Timeslips\DataXX** where C is the drive on which Sage TimeSlips is installed and XX is the number of the data directory (for example, C:\Program Files\Timeslips\Data01).

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## Detailed information on items converted and not converted

### Types of conversions offered

The Sage TimeSlips to Practice CS conversion offers two methods of conversion, each providing differing amounts of data and benefit. Your firm should carefully consider the available options and the type of information you need. The available conversions are:

**Demographic:** The converted data includes only identifying information for clients, staff, offices, and contacts, such as their names, addresses, and phone numbers, as well as practice management system configuration settings such as engagements and activities. The converted data does not include any portions of time and billing elements (time, expenses, invoices, receipts, and adjustments).

**WIP & A/R:** The converted data includes:

- Identifying information for clients, staff, offices, and contacts
- Summary information for unbilled time and expenses (WIP)
- Summary information for unpaid invoices
- Summary information for unapplied receipts and adjustments

Data to be converted	Demographic	WIP & A/R
Demographic information	Yes	Yes
Unbilled time and expenses (WIP)		Summary
Unpaid invoices		Summary
Paid invoices		
Billed time and expenses		

<b>Data to be converted</b>	<b>Demographic</b>	<b>WIP &amp; A/R</b>
Unapplied receipts and adjustments		Summary
Applied receipts and adjustments		

**Note:** If you have questions about the conversion of your data, contact your Practice CS conversion specialist. If you do not yet have a conversion specialist, contact your sales representative.

## Items transferred during conversion

The following tables are provided to identify fields in Sage TimeSlips that are converted to Practice CS. The tables are organized by screens in Sage TimeSlips and Practice CS and denote the necessary Practice CS screen navigation.

### Activity information

<b>Sage TimeSlips field name</b>	<b>Practice CS menu navigation / Practice CS field name</b>	<b>Comments and additional information</b>
	<b>Setup &gt; Activities</b>	
Nickname1	ID	See "Conversion notes and exceptions"
Full Name	Description	
N/A	Type	Task items convert as Time. Expense items convert as Expense.
Bill Status	Class	Items other than Billable are converted as Non-billable
Classification	Status	Items other than Open are converted as Inactive
Price	Unit Price	Expense items only

### Bank account

<b>Sage TimeSlips field name</b>	<b>Practice CS menu navigation / Practice CS field name</b>	<b>Comments and additional information</b>
	<b>Setup &gt; Bank Accounts</b>	
Name	Description	

### Client

<b>Sage TimeSlips field name</b>	<b>Practice CS menu navigation / Practice CS field name</b>	<b>Comments and additional information</b>
	<b>Setup &gt; Clients &gt; Main</b>	
Nickname1	ID	See "Conversion notes and exceptions"

<b>Sage TimeSlips field name</b>	<b>Practice CS menu navigation / Practice CS field name</b>	<b>Comments and additional information</b>
Name	Description	
Name	Name 1	
N/A	Class	All clients were converted as Client
Classification	Status	Clients not marked as Open were converted as Inactive
N/A	FYE	All clients were converted as December year ends
<b>Setup &gt; Clients &gt; Contact Info</b>		
Name	Name	
Name	File As	
Phone	Business phone	
Other	Other Phone	
Fax	Fax Phone	
Home	Home Phone	
Address (Line 1)	Business Address line 1	
Address (Line 2)	Business Address line 2	
City	Business City	
State	Business State	
Zip	Business Zip	
Country	Business Country	Practice CS allows 25 characters for Country. TimeSlips allows 60 characters.
E-mail	E-mail	
<b>Setup &gt; Clients &gt; Engagements</b>		
	ID	See "Conversion notes and exceptions"
	Description	See "Conversion notes and exceptions"

## **Engagement**

<b>Sage TimeSlips field name</b>	<b>Practice CS menu navigation / Practice CS field name</b>	<b>Comments and additional information</b>
<b>Practice &gt; Clients</b>	<b>Setup &gt; Templates &gt; Engagements</b>	
	ID	See "Conversion notes and exceptions"
	Description	See "Conversion notes and exceptions"
	Status	See "Conversion notes and exceptions"

## Firm

Sage TimeSlips field name	Practice CS menu navigation / Practice CS field name	Comments and additional information
<b>Setup &gt; General Settings</b>	<b>Setup &gt; Firm &gt; Main</b>	
Name	Firm Name	Firm Name converted as New Firm
	<b>Setup &gt; Firm &gt; Contact Info</b>	
Name	Name	
Address	Business Address Line 1	
City	Business City	
State	Business State	
Zip Code	Business Zip	
Phone 1	Business Phone	
Phone 2	Mobile Phone	
Fax 1	Fax Phone	
Fax 2	Other Phone	

## Staff

Sage TimeSlips field name	Practice CS menu navigation / Practice CS field name	Comments and additional information
	<b>Setup &gt; Staff &gt; Main</b>	
Nickname1	ID	See "Conversion notes and exceptions"
Name	Description	
Name	First name	See "Conversion notes and exceptions"
Name	Last name	See "Conversion notes and exceptions"
Classification	Status	Staff not marked as Open were converted as Inactive
	<b>Setup &gt; Staff &gt; Contact Info</b>	
Name	File as	Lastname, Firstname
E-mail address	E-mail	
	<b>Setup &gt; Staff &gt; Rates</b>	
Hourly Cost	Cost rate	

## WIP and A/R balances

In addition to setup data, the Sage TimeSlips to Practice CS conversion can convert summary amounts for Accounts Receivable (A/R) and Work-In-Process (WIP) information.

**If the WIP and A/R conversion is selected:**

- Unbilled time (WIP) is converted as one summary time entry per billable client. The amount of the time entry will be the total of each client's outstanding WIP balance. Negative amounts are not converted.
- Unpaid invoices (A/R) are converted as one summary debit memo. The debit memo will be the total of each client's outstanding A/R balance. Negative A/R amounts are not converted.

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**Note:** The *Available WIP Listing* report was exported from Sage TimeSlips in order for the conversion to retrieve unbilled WIP amounts. If you chose to have Billing Arrangement WIP converted prior to running the conversion, the slip WIP and Billing Arrangement WIP were converted as separate sheet entries. "Slip WIP" or "BA WIP" are noted in the comment field of sheet entry.

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## Conversion notes and exceptions

- Because of truncations and the removal of non-alphanumeric characters in the Activity ID, Activity IDs may be duplicated during conversion. When this occurs, the duplicate ID is renamed ConvTIMX (for Task items) or ConvEXPX (for Expense items) where X is the number in which the item was renamed.
- Practice CS requires A/R and WIP balances to be associated with an activity. The activity "Default" was converted.
- Because of truncations and the removal of non-alphanumeric characters in the Client ID, Client IDs may be duplicated during conversion. When this occurs, the duplicate ID is assigned a number beginning with 100000 and incremented 1 for each client that is renamed.
- Practice CS requires client engagements and engagement templates. TimeSlips does not have engagements or engagement templates. The engagement and engagement template "Default" were converted.
- Because of truncations and the removal of non-alphanumeric characters in the Staff ID, Staff IDs may be duplicated during conversion. When this occurs, the duplicate ID is renamed ConvSTAFFX where X is the number in which the item was renamed.
- The staff member "Staff" was added because it is required to convert A/R and WIP balances.
- Sage TimeSlips has one field for staff name. Practice CS has fields for first and last. Staff first and last names were determined based on the space preceding the last entry in the *Name* field.

## Items not converted

The following items are not converted due to differences in data structures between Sage TimeSlips and Practice CS. After the conversion, enter the applicable items before you begin using Practice CS.

- Invoice, statement, and report formats
- Security levels
- Staff titles
- Projects and tasks
- Service codes — Additional charges and mileage/unit rates
- Flat rate service charges
- Rates – Tax rates, expense rates, client rates, professional rates

- Standard paragraphs
- Tax areas

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## Getting help

If you have any questions about the conversion process, please contact your conversion specialist. Our professional staff will be glad to assist you.