



October 21, 2012

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## TO

All Practice CS® users.

This user bulletin explains changes made to this release of Practice CS.

## NEW SYSTEM REQUIREMENTS

Effective with this release of Practice CS, we are discontinuing support for Microsoft® SQL Server® 2005 (all editions). Practice CS will no longer function with Microsoft SQL Server 2005; we'll support only SQL Server 2008 or higher. Please see the [System Requirements page of our website](#) for additional information.

If you are using the Express edition of Microsoft SQL Server 2005, you can upgrade your SQL instance to SQL 2008 R2 SP2 when you install this release of Practice CS . If you are using another version of Microsoft SQL Server 2005, please see [K76032701](#) for guidance on planning your upgrade.

## ENHANCEMENTS

Many of the enhancements that are available in this update are protected by security privileges. If your firm has enabled firm security, please evaluate all enhancements and update your security groups as needed. For more information about enhancements, please see [What's New in Practice CS](#).

Version 2012.2.0 of Practice CS includes the following enhancements.

### Help & How-To Center

The new Help & How-To Center provides one-stop access to the information you need while using Practice CS. We've combined all content from the help system and the Support knowledgebase into a single repository that is hosted on our website and accessible directly from within Practice CS.

Because the Help & How-To Center resides on our website, we can update and expand the content between releases, based on your feedback, searches, and questions. In addition, the Help & How-To Center offers several significant enhancements.

- A much more robust search engine that provides more relevant search results quickly.
- New search options that allow you to search all Practice CS topics at once, to limit the search by one or more subject categories, or to search for information on another application without having to open that application.
- Full compatibility with your preferred browser so that you can use your browser's regular features to navigate, search, print, and bookmark the topics you visit most often.

### Notes

- An active internet connection is required to access the Help & How-To Center.
- For more information (including some sample searches you can try), see [Finding answers in the Help & How-To Center](#).

## Integration

- Practice CS will now create a new client drawer and Practice CS folder in FileCabinet CS® when creating new clients.
- A Practice CS project can now be associated with a GoFileRoom® workflow.
  - You can search for and select GoFileRoom workflows on projects. After you select a GoFileRoom workflow for a project, you can launch the FirmFlow folder directly from the Projects setup screen.
  - You can group and filter project management reports by workflow data.
  - A new Workflow Budget to Actual report is available in the Practice CS Library portlet.

## Dashboards

The Key Totals portlet on the Firm and Client dashboards now reports year-to-date and prior year-to-date information based on the firm year instead of on the calendar year.

## Setup

In Setup > Clients, you can now do the following:

- Create custom fields for all contact types.
- Associate links with contacts.
- Edit custom field values for multiple engagements.

## Billing

- You can now create invoices with a negative total amount, allowing you to reverse positive billings and taxes from a prior period.
- The Compose tab in Detail Billing now suppresses line items that are expressly hidden by a custom invoice format.
- A new Totals section in the Compose tab of the Detail Billing screen shows you the composed total, the total bill amount, and the difference between them. Subtotals are included if a subtotal section is out of balance.
- User preferences now allow you to include staff description on the Time & Expense tab of Detail Billing.

## Time & Expense Entry

Project and task solutions are now available to display in Time & Expense Entry. Clicking a solution launches the specified program and starts a timer.

## Reporting

- Report options now include a *Description override* field. Text that you enter in this field is displayed in the Selected Reports pane, in the Profiles section of the Print Reports screen, as the report title, and used as the name when printing to FileCabinet CS, GoFileRoom, to a file, or to an email message.
- All staff fields are now available to use for staff list custom fields in custom formatting.
- Rich Text boxes on custom formats now allow you to change the font style and size.
- A new standard letter, Client Letter – Preferred Contact, will use the Preferred contact's name and address information.

## Receipt and Adjustment Entry

- You can now add custom fields to receipt and adjustment entries.
- You can now add links to receipt and adjustment entries.

## Project Management

- You can now use the Field Chooser to add Client Name 1 to the Project Management grid.
- Practice CS now automatically determines the UltraTax CS year to use as the solution on projects based on the project's due date and the client's year end.

## Client Management



You can now create security privileges for Client Management screens based on each staff member's office assignment.

## Staff Management

Calendars now automatically refresh when you add new schedule items.

## HELP & SUPPORT

### Practice CS Help & How-To Center

For answers to questions on using Practice CS, access the Help & How-To Center by choosing Help > Help & How-To, clicking the  button and selecting a topic, or pressing CTRL+Y. You can also use the Search  field in the toolbar to search for topics. For more information, including sample searches, see [Finding answers in the Help & How-To Center](#).

### Product support

From the [Support Contact Information page on our website](#), you can complete a form to send a question to our Support team. To speak directly with a Support Representative, call (800) 968-0600, press **2** for Product Support, and then listen to the available options. Normal weekday support is available from 9:00 a.m. to 8:00 p.m. eastern time. For additional details (including extended support hours for tax season and hours for other applications), visit the [Support section of our website](#). You can also access the Support section from within Practice CS by choosing **Help > Additional Resources > General Support Information**.

### Website resources and email subscriptions

Visit our [website](#) to access the ARNE Community (an online user forum), to learn about training courses, to view blogs and articles, and more. You can access the website from within Practice CS by choosing **Help > On the Web > CS Professional Suite Home page**.

We issue software update notices via email. You can sign up to receive these notices by visiting the [My Account section of our website](#). You'll need to create a web account (if you don't already have one) and then sign up for the Email Subscription service where you can indicate which notices you want to receive.