



November 7, 2013

TO

All Practice CS® users.

PURPOSE

This user bulletin highlights some of the features that are available in Practice CS and explains the tools that are available to help you familiarize yourself with the product. It includes information about integration among Practice CS, other CS Professional Suite® applications, and Microsoft® Office applications. It also provides you with information about contacting CS Product Support. Please print this user bulletin and share it with all Practice CS users in your office.

PRACTICE CS FEATURES

The following is a high-level overview of features that are available in Practice CS.

- Enter time and expenses — whether in the office or working from a remote location
- Bill your clients and enable them to pay invoices online
- Enter receipts and adjustments
- Process credit card transactions and ACH receipts through InterceptEFT*
- Assess service charges
- Print and create custom formats for invoices, statements, reports, mailing labels, and letters
- Display charts on many standard reports, and add customized charts to standard and custom formats
- Access your Microsoft Outlook® Mail, Calendar, and Tasks through Practice CS dashboards
- View RSS news feeds and create your own custom firm news portlet on any Practice CS dashboard
- Receive Practice CS News from the Practice CS dashboards. The Practice CS News portlet provides news and information related specifically to Practice CS users.
- View documents stored in FileCabinet CS®
- If you are licensed for the Practice CS Project Management module, track projects, tasks, and due dates, and receive desktop notifications when monitored events occur
- If you are licensed for the Practice CS Client Management module, quickly access information about clients, contacts, and business affiliates; look up interactions with contacts such as phone calls and email; and track referral sources
- If you are licensed for both the Practice CS Client Management module and NetFirm CS,™ transfer files to your contacts securely through your contacts' NetClient CS® portals
- If you are licensed for the Practice CS Staff Management module, set target hours for your staff, assign work based on staff qualifications, schedule work for specific dates and times, track accruable staff benefits such as comp time, and more

* **Disclaimer:** InterceptEFT™ is an unaffiliated third party that some of our customers have engaged to provide direct deposit, tax payments, ACH processing, or credit card merchant services.

A more comprehensive description of these features is included in the [Practice CS Getting Started guide](#). See the "Learning Tools Available" section of this user bulletin for information about viewing or printing the getting started guide.

INTEGRATION AVAILABLE

Practice CS integrates with the following applications.

- **Creative Solutions Accounting™ (CSA)** — Share client data information with CSA; populate Practice CS with client information from CSA; export journal entries to CSA; integrate invoices and client notes from CSA; and use CSA as a solution for completing projects and tasks if you are licensed for the Practice CS Project Management module.
- **FileCabinet CS** — Print invoices, statements, and reports to FileCabinet CS; view documents stored in FileCabinet CS in the Practice CS dashboards; and export clients from Practice CS to FileCabinet CS.
- **Microsoft Outlook** — View Outlook Mail, Tasks, and Calendar on the Practice CS dashboards. If you are licensed for the Practice CS Client Management module, you can also export your Practice CS contacts to Outlook and synchronize them with your Outlook Contacts.
- **NetClient CS** — Publish invoices to NetClient CS portals, and enable clients to pay invoices online. Transfer files securely to NetClient CS portals. Practice CS can automatically create NetClient CS and NetStaff CS® portals for new clients and staff.
- **ToolBox CS®** — Export your clients to ToolBox CS
- **UltraTax CS®** — Share client data information with UltraTax CS; populate Practice CS with client information from UltraTax CS; integrate invoices from UltraTax CS; use UltraTax CS as a solution for completing projects and tasks if you are licensed for the Practice CS Project Management module; view client complexity in schedule items grids, and view 1040 return history on the Client Dashboard.
- **Accounting CS™** — Share client data information with Accounting CS; export journal entries to Accounting CS; and select Accounting CS as a solution for completing projects and tasks if you are licensed for the Practice CS Project Management module.
- **GoFileRoom®** — Practice CS can print invoices, statements, and reports to GoFileRoom CS and display GoFileRoom FirmFlow™ – My Work on the Staff Dashboard. Practice CS can also display GoFileRoom documents on the Client, Firm, and Staff Dashboards.

LEARNING TOOLS AVAILABLE

The following resources are available to help you learn how to work in Practice CS.

Note: You must use Adobe® Reader® to view and print the resources that are available as PDF files. To install Reader, open Practice CS and choose Help > On the Web > Adobe Reader, which takes you to the Adobe website from which you can download and install the Reader.

- **Resources portlet.** The Resources portlet is available on the Practice CS Home Dashboard. It provides links to the Practice CS help, getting started guide, CS.ThomsonReuters.com, Support information, and more.
- **Help & How-To Center.** The primary documentation for learning about and using Practice CS, the Help & How-To Center includes information about product features, data-entry windows, and procedures. Choose Help & How-To from the Help menu and then click the **Browse Subjects, Index, or Search Options** link and navigate to a specific topic. You can press F1 or CTRL+F1 to view overview help about the active window or dialog, or you can click the down arrow in the upper-right corner of many screens to view a list of the most common tasks for that screen. For more information on using the Help & How-To Center, refer to the topic [Finding answers in the Help & How-To Center](#).
- **Practice CS Getting Started guide.** This guide provides an overview of Practice CS features and a walkthrough section that uses a sample client and allows you to practice some of the basic procedures that you will use when processing your own clients. To view or print the latest version of this guide, choose Help & How-To from the Help menu, and search on **getting started guide**.
- **Practice CS guides in PDF.** You can view and print these documents from the Practice CS help. The guides available in PDF include:
 - *Practice CS Getting Started* guide (discussed above)
 - *Practice CS Sample Reports* guide
 - Walkthroughs with hands-on exercises for time entry, billing, accounts receivable and client statements, and custom formats. There are also walkthroughs for working in the optional Project Management, Client Management, and Staff Management modules.

To access the guides, choose Help & How-To from the Help menu and enter **Viewing Practice CS guides in PDF** in the *Search* field. You can also access these guides on any dashboard via the Help Videos & PDFs tab of the Practice CS Library portlet.

- **CS Professional Suite training**
 - **On-demand training.** Inexpensive, convenient, and available 24/7, anyone in your firm can access these self-paced courses, from anywhere an internet connection is available.
 - **Web-based classes.** For these interactive classes, you use your own computer and the internet to learn how to maximize your productivity and to earn CPE credit. You participate in a live broadcast, with an instructor and other registered students from your firm and from around the country.
 - **Hands-on classroom training.** These classes rely on traditional hands-on classroom settings with presenters and are offered across the country, for a select group of courses.
 - **On-site training.** Our professional instructors will come to your site to give hands-on training to you and your staff.

To view a current list of courses, visit our website at CS.ThomsonReuters.com and click the **Training** link.

- **Custom Services.** Our team of experts can create custom invoice, statement, and report formats to fit the specific needs of your firm. We can also assist you with importing custom data into your Practice CS database.
- **Annual Users' Conference.** We host an annual conference (in a different location each year) where we offer workshops for many of our products to users at all levels of experience.

LICENSE AND SOFTWARE UPDATES AVAILABLE VIA CS CONNECT™

Note: If your firm licenses Practice CS through Virtual Office CS® or through Software as a Service (SaaS), you do not need to use CS Connect to retrieve licenses or software updates. We install updated product licenses for your firm, and we install software updates to the Virtual Office CS servers as needed.

Each year there will be one or more major releases of Practice CS. Outside of these major releases, new or updated license information and any interim releases that add new features or that address issues in the software are available only via CS Connect.

It is very important that you download and apply the software updates when they become available. We recommend that you log on to CS Connect after you first install your Practice CS software and periodically in the first few weeks after each CD release or at the beginning of each calendar quarter to download any software updates that may be available. The Practice CS News portlet available on the Home Dashboard will provide announcements when program updates are available for download via CS Connect. Also note that you may receive special notifications of update releases by signing up for our Email Subscription service (as outlined in the Support section below).

The first time you download license information, you will need to choose Help > About Practice CS and click the Download Licenses button. After that, you will be able to retrieve updates through CS Connect as described below.



To open CS Connect from the Practice CS main window, choose File > CS Connect, or click the CS Connect button on the toolbar.

- To download software updates, mark the *Retrieve available updates* checkbox prior to initiating the call to CS Connect.
- To download updated license information for your firm, mark the *Retrieve licenses* checkbox prior to initiating the call to CS Connect.

There is extensive documentation for using CS Connect, including specific information about how to download and apply software updates. From the CS Connect dialog, press F1 or CTRL+F1 to open the CS Connect help topics.

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 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.