Practice CS, v.2016.2.0
User Bulletin 8419: Software Update

December 4, 2016

TO

All Practice CS® users.

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

CHANGES

Login security

At Thomson Reuters, the security of your data is a top priority—and we're taking steps to strengthen data security, protect your business, and comply with recent IRS security requirements. As a part of that effort, we have implemented a new login process across all CS Professional Suite applications. For more information, see CS Professional Suite application security overview.

Dashboards

- The Client Information portlet now displays the client's EIN when allowed by security. (Idea #414)
- The Discount field is now a column option on the Prior Invoices portlet. (Idea #1570)

Setup

- The client's fiscal year end has been added as a standard text date variable. (Idea #1073)

Project Management

- Project task information can now be individually selected to generate from the prior project or project template. This includes descriptions, assignments, calendar entries, notes, links, and custom field values. (Idea #763)
- On task lists and task-related portlets, you can now display the priority of the project for each task. (Idea #1458)
- The Project Description is now a column option in the Work Queue portlet. (Idea #572)
- The default project templates that are available for import have been updated for due date changes related to HR 3236.
- Additional filtering is available within Project Management to aid in determining the recurrence patterns set up for projects.
- Quarterly project recurrences can now be based on the client's fiscal year end. (Idea #1562)

Time & Expense Entry

- If you have **not** set the user preference to allow simultaneous timers, Practice CS warns you when you try to start a timer while one is already running. You can now mark the **Don't show this message again** checkbox before responding to the warning message. Practice CS will then remember your choice — to stop the current timer and start a new one, or to leave the current timer running — and will apply the same choice automatically in the future without any additional warning. (Idea #74)

Billing

- Additional variables are now available for inclusion in the subject and body of email messages that accompany invoices and statements.

    - Current Variables:
      [Client Contact Name], [Invoice Number], [Firm Name]
    - New Variables:
      [Client Salutation], [Client Name], [Client ID], [Client Manager], [Client Manager Email], [Client Manager Phone], [Client Partner], [Client Partner Email], [Client Partner Phone], [Client Associate], [Client Associate Email], [Client Associate Phone], [Client Office], [Client Office Phone], [Client Office Email], [Firm Phone]
- Firms that do not want to affect prior periods can use invoice reversals to cancel unpaid invoices. Invoices can be fully or partially reversed. This is referred to as Recovered WIP. Recovered WIP will be available for billing on a later invoice. Recovered WIP will not be reported as production.

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 Search for assistance 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 and follow the prompts. 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 Tax & Accounting Community (an online user forum, formerly known as ARNE), 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 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.