Practice CS, v.2014.2.2
User Bulletins 8154: Software Update

October 19, 2014

TO

All Practice CS® users.

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

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 additional information about enhancements, see the "What's new in Practice CS" help topic. From the Help menu, choose Help & How-To, then click the "What's new in Practice CS" link in the *Alerts and notices* box on the right.

Version 2014.2.2 of Practice CS includes the following enhancements.

System

Security privileges have been added to prevent staff from completing projects. *(Practice CS Ideas Community, Idea 683)*

Integration

Individual and *Spouse Date of Birth* fields have been added to the Main tab of the Clients setup screen. These fields will share data with UltraTax CS.® *(Practice CS Ideas Community, Idea 418)*

Dashboards

Invoice notes can now be viewed in the Prior Invoices portlet on the Client Dashboard.

Billing

- Zero amount invoices can now be assigned to their own number sequence, so they do not use numbers in your regular invoice sequence range. *(Practice CS Ideas Community, Idea 11)*
- You can now override the invoice format when you generate recurring bills.
- You can now filter invoices by amount.
- Staff with security privileges to approve and post invoices can now edit invoices without unapproving and unposting them first. *(Practice CS Ideas Community, Idea 1214)*

Setup

- Inactive clients with *Left* dates are now included in Edit Multiple Clients. *(Practice CS Ideas Community, Idea 1090)*
- You can now select multiple engagements as the default engagements for new clients.

Time and Expense Entry

- The focus will now remain in the current field if you type an invalid entry and choose not to add it. *(Practice CS Ideas Community, Idea 971)*

- A WIP transfer utility has been added to Time & Expense Entry. *(Practice CS Ideas Community, Idea 513)*
- The desktop timer now shows all running timers for all sheet dates in the same screen.
- The warning regarding running timers now has the option to display all running timers. *(Practice CS Ideas Community, Idea 843)*
- You can now add or remove columns on the grid in the desktop timer by using the Field Chooser.

Staff Management

The Field Chooser on the Assignments tab of the Staff Management screen now includes the following fields.

- Staff Target Hours
- Staff Available Hours
- Calendar Entries Remaining Hours

Reporting

You can now expand and collapse the list of available reports in the Print Reports screen by section heading. *(Practice CS Ideas Community, Idea 834)*

Custom Formatting

You can now specify the page on which a page header should start printing on letters. *(Practice CS Ideas Community, Idea 1004)*

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.