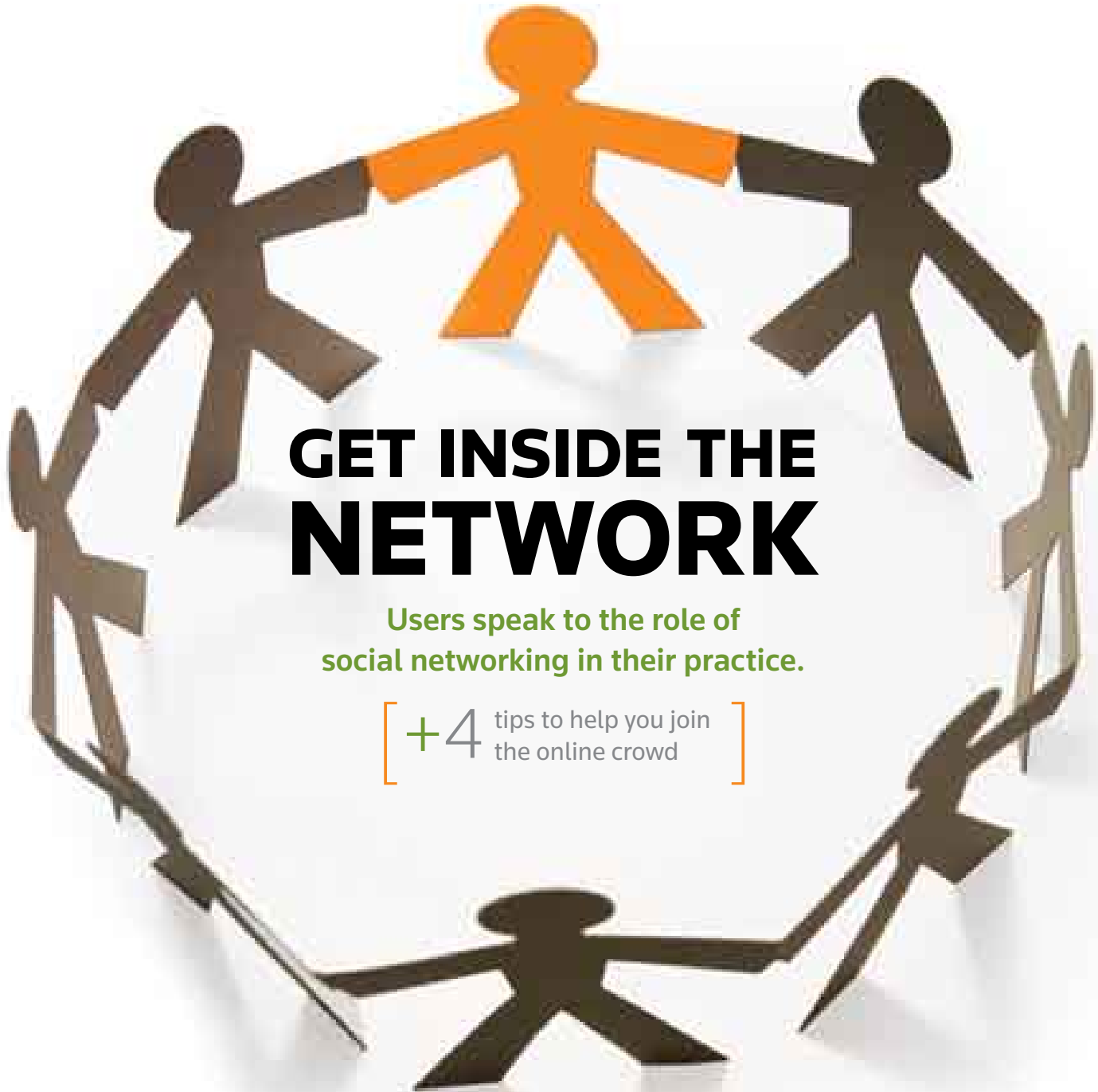




SOLUTIONS



GET INSIDE THE NETWORK

Users speak to the role of social networking in their practice.

[+4 tips to help you join the online crowd]

MAN OF TOMORROW

It's a bird. It's a plane. It's a Q&A with Matt West.

YOUR QUESTIONS ANSWERED

7 pressing software problems and advice to go with them.

PATSY PORTER'S PROMISE

Plus, the software and consultant that helped her deliver.



SOLUTIONS

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Practice Makes Perfect



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Matt West



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Network

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IN YOUR WORDS

Share best practices at our new online brag board.

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TIPS & TACTICS

No question's too big or too small for our software experts.



Questions or feedback? Email your thoughts to Solutions@ThomsonReuters.com.



Join our online users' forum, at CS.ThomsonReuters.com/Community.



Find more on the web, at CS.ThomsonReuters.com.

CREATING THE NEXT-GENERATION COMMUNITY



The idea of community has changed enormously over the past decade. No longer limited geographically, we can now connect online with others in our profession in more interactive and dynamic ways, staying updated with the latest topics and trends across the tax and accounting community.

As a Thomson Reuters customer, you've been able to access our website for the latest information on products, events, and announcements, as well as participate in the Accountant's Resource Network2 (ARNE2), the previous generation of our online community for the accounting profession. Now, to provide a more robust sense of community for our customers, we're happy to announce several enhancements to our website.

Bells, Whistles, and Community

First, our CS Professional Suite and Enterprise Suite websites have merged into one comprehensive site, bringing all our products and services—for every size firm—together in a common area, creating a greater sense of community. Next, you'll be able to read and comment on *Solutions* articles online, facilitating discussions of the topics highlighted in each issue. We'll also feature podcasts highlighting the latest trends and best practices of tax and accounting professionals.

Last—and most exciting, to me—is the new ARNE community, which takes its inspiration from social networks like Facebook® and LinkedIn®. Thanks to expanded user profiles and functionality, the new community will be much more interactive and customizable. As with ARNE2, you'll be able to post messages and participate in discussions, but now you can also view recent activity, create “friend” networks, calendars, photo galleries, and blogs. New user- and Thomson Reuters-created groups will promote increased collaboration and connection between professionals with the same focus or interests.

It's hard to overestimate the importance of interacting with clients and colleagues and keeping ourselves up to date on our industry. Creating a sense of community and opening up the lines of communication with the help of social networking tools is essential for tax and accounting professionals in today's environment. These enhancements also improve our ability to interact with you, allowing us to develop and deliver the products and services you need to do your job effectively.

We invite you to join our community and take part in the exchange of ideas. We look forward to seeing you online!

Jonathan A. Baron
President, Professional Software & Services
Tax & Accounting Business of Thomson Reuters



Baron tells us what inspires him to come to work every day. Listen and learn. Check out his latest podcast at CS.ThomsonReuters.com/Solutions

CS Professional Suite® & Enterprise Suite™

ACCOUNTING

- Client Bookkeeping Solution®
- Engagement CS™
- Financial Analysis CS™
- Trial Balance CS™
- Write-Up CS™

DOCUMENT MANAGEMENT

- FileCabinet CS™
- GoFileRoom®

PAYROLL

- myPay Solutions®
- Payroll CS™
- Service Bureau Payroll CS™

PRACTICE MANAGEMENT

- Practice CS™

TAX

- Fixed Assets CS™
- GoSystem® Tax RS
- Planner CS™
- ToolBox CS®
- UltraTax CS™

WEB SERVICES

- NetClient CS™
- Virtual Office CS™
- Web Builder CS™

THE FUTURE IS BRIGHT

There's still time to register for one of the upcoming Partner Summits, where you'll discover how to take your firm confidently into the future.



These collaborative, two-day gatherings will help partners and decision makers define the steps to bring their firms to the next level of productivity and profitability. Attendees can earn CPE credits with sessions that cover topics such as imaging your firm, integration, streamlining processes, technology, and more.

This year's presenter is **M. Darren Root, CPA.CITP**, co-founder and managing partner of RootWorks, LLC, president of Root & Associates, LLC, and executive editor of *The CPA Technology Advisor*

magazine, who will conduct a two-part workshop, "The Next Generation Accounting Firm: Change is Upon Us ... Where Do We Go From Here?" Thomson Reuters staff will also present strategies for using the CS Professional Suite of products to accomplish your goals.

► **THE 2009 PARTNER SUMMITS WILL BE HELD IN THE FOLLOWING LOCATIONS:**

BOSTON, MA: July 28-29, Hyatt Regency Boston **SOLD OUT**

MINNEAPOLIS, MN: August 1-2, Hyatt Regency Minneapolis **SOLD OUT**

SAN DIEGO, CA: July 29-30, San Diego Marriott Hotel and Marina

SEATTLE, WA: August 12-13, Grand Hyatt Seattle



FOR DETAILS about hotel and session availability and to register, go to **CS.ThomsonReuters.com/Summits**.

You can also contact your Account Representative at **800.968.8900** for more information. Space is limited, so call today. If you can't make it to the Partner Summits, you'll want to check out our Users' Conference in November. See page 16 for more details.

The cost to attend is \$495 per person and includes educational materials, two breakfasts, two lunches, and one dinner. To facilitate interaction between presenters and attendees, each summit is limited to 40 participants, so be sure to register today.

Lloyd Leuthner ♥s His Job

Congratulations to Lloyd Leuthner, author of the winning "I Love My Job" story in the CS Professional Suite contest. As the winner, Lloyd was featured in an "I Love My Job" ad in several accounting industry publications in February and March 2009.

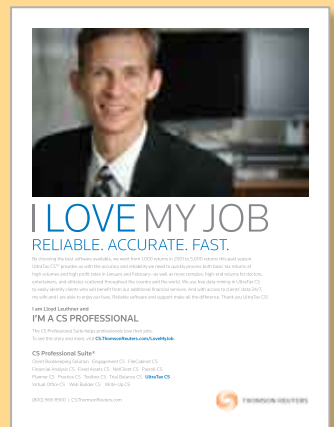
Lloyd rallied his friends and co-workers to help him win the contest, urging other CS Professional Suite users in his Facebook network

and on ARNE2 to visit **CS.ThomsonReuters.com** and vote for his entry.

So why *does* Lloyd love his job? "[I] get to have fun every day because UltraTax CS easily lets me keep in touch with my clients scattered throughout the country and world." He also likes the fact that 24/7 access to clients' data means he and his wife have time to enjoy their lives, plus, "... easy-to-use UltraTax CS processes high-end

returns for doctors, entertainers, and multi-state athletes. We are known as the multi-state experts in our community."

A graduate of the University of Wisconsin at Green Bay, he joined Leuthner Tax & Financial (**LeuthnerTax.com**) after college, adding tax and accounting services to the firm. As an Enrolled Agent and CPA, he represents clients in tax court.



► **Read Lloyd's and other stories at CS.ThomsonReuters.com/LoveMyJob. Go to UltraTax CS for Lloyd's story.**

Let Practice CS Help Manage Your Staff



The new Staff Management Module is now available with the latest release of Practice CS. This eagerly awaited addition to our award-winning practice management software is designed to aid your firm with staff management, with several notable features included.



You'll be able to **track employee benefits**—including vacation accrual, paid time off, sick days, and comp time. **Easily budget staff time**, which lets you **compare staff target hours to actual hours**. Staff scheduling is

also included, which enables you to **view staff overall workload**; schedule staff according to availability, workload, skills, etc.; assign work to staff pools; and view multiple staff schedules simultaneously.



Practice CS now seamlessly encompasses all major areas of your firm's management, with Client, Project, and now Staff Management Modules at your service.

Contact Sales at **800.968.8900** to learn more.

Give Your Clients More

Announcing Hosted QuickBooks® Via NetClient CS Powered By Right Networks



Thomson Reuters has teamed up with our preferred

partner Right Networks to offer your clients 24/7 access to their QuickBooks® software through NetClient CS portals on your website. Your client uses private, secure NetClient CS portal technology to access their QuickBooks software, while Right Networks, an Intuit®-approved vendor for QuickBooks hosting services, delivers reliability, security, and data protection through secured data centers, daily back ups, and redundant infrastructure.

For more information on QuickBooks hosting via NetClient CS, contact Sales at **800.968.8900**.



TO SCREEN OR NOT TO SCREEN

Thomson Reuters partners with National Crime Search.

Employers who conduct background screenings greatly reduce the incidence of employee theft, fraud, and embezzlement, and send a message to employees, vendors, and clients that they're serious about safety.

To help you in these efforts, Thomson Reuters has added a new member to our list of preferred partners—National Crime Search (NCS). Available to all Thomson Reuters customers, including myPay Solutions users, NCS offers access to a wide range of criminal, financial, and employment history reports that you or your clients can use to perform screenings on potential employees. NCS brings to the partnership more than 20 years' experience in providing full-scale background check services.

With this affordable service, you'll gain access to a national criminal directory that includes the records of all 50 states, plus the District of Columbia, Guam, and Puerto Rico. You'll also have access to financial records both here and abroad, as well as many other background search options.

Customers can choose from a variety of packages and search options—including the option of setting up a personalized website—that are designed to ensure that customers get instant access to the most updated and relevant data possible.



FIND OUT MORE by visiting CSThompsonReuters.NationalCrimeSearch.com.



THE FACTS ON WEST ↓

MOST INTERESTING PLACE MATT'S FLOWN TO AS A PRIVATE PILOT:

Middle Bass Island at Put-in-Bay, Ohio.

"I've been boating there since I was a kid. There's no other place on earth I'd rather be in the summer."

THREE WORDS THAT COME TO MIND WHEN HE THINKS OF FLYING:

Freedom, responsibility, expensive.

HIS THREE PIECES OF ADVICE FOR A CAREER IN SALES:

IN SALES:

- [1] Have big goals and never let anyone persuade you otherwise.
- [2] Be patient when working towards those goals.
- [3] Each day, choose to be a little better than you were yesterday.

BEHIND THE SCENES AT THOMSON REUTERS:

MATT WEST Takes Life To New Heights

You've been a runner for 24 years. Now you guide blind athletes in triathlons. Tell us about that.

From a physical perspective, racing with a blind athlete is virtually the same as racing alone but there are a few exceptions. We use a tether to swim and run side by side, and bike on a tandem. Sometimes I even forget that Aaron Sheidies, a triathlete I race with, is blind.

You're different than many sales professionals because you have a master's degree in communications.

At Thomson Reuters, we focus on consultative sales versus order-taking by understanding a client's needs so we can determine the most effective solution. As a result, I use the same type of probing and research I used when earning my master's degree. Over the years, the ability to listen, empathize, and become real to my clients has helped me help them.

Can you explain what drives you to do these many extra-curricular activities?

I run because it makes me feel human and gets me back in touch with the outdoors. There are two reasons I fly, race, and give my time: First, I have been given the opportunity to do so, and second, it inspires me and holds me accountable.

MATT WEST, account representative for the Tax & Accounting business of Thomson Reuters in Dexter, Mich., started with the company as an intern in 1997. When he's not at the office, you'll find him flying planes, guiding blind athletes in triathlons, and even planning an annual used-clothing drive to benefit a local nonprofit.

Solutions: What is it about flying that you can't get from other hobbies or pursuits?

Matt West: I've been attracted to airplanes for as long as I can remember. There are so many emotions, from fear to exhilaration. Flying builds character and gives you confidence to make the right decisions that carry over into other aspects of your life.

In future issues of Solutions, we'll take you behind the scenes to introduce a Thomson Reuters staff member. These are the people dedicated to making our products work harder for you—and, as you'll read, they're equally dedicated to creating full lives outside of the office.

Time to TOOT YOUR HORN

Your mother was right: Nobody likes a showoff. Unless, of course, you're bragging for the sake of sharing best practices and noteworthy accomplishments.

It's exactly this kind of boasting we invite you to do on our new online brag board, "It's All About You." The latest addition to Thomson Reuters' ARNE, an online community exclusively for accountants, "It's All About You" is where you can share your professional and personal successes, including awards, appointments, promotions, and relocations with other ARNE community users. To inspire you, here are several recent accomplishments and honors enjoyed by Thomson Reuters users.

- ▶ **PLANTE & MORAN OF GRAND RAPIDS, MICH.**, moved into greener office space made with environmentally friendly and locally made products, that features energy-efficient utilities, water-efficient plumbing, and onsite recycling.
- ▶ **IN NEW YORK CITY, CITRIN, COOPERMAN & COMPANY, LLP**, recently announced the creation of a Growth and Protection Team, which will provide consulting services for small and mid-size businesses, led by partner **ALAN BADEY**.
- ▶ **ALLEN ELLENTUCK OF KING & NORDLINGER, LLP, IN ARLINGTON, VA.**, received the 2008 Arthur J. Olson Memorial Award. The award is the accounting profession's highest award in the area of taxation, from the AICPA's Tax Division.
- ▶ From the Peach State, **TARPLEY & UNDERWOOD OF ATLANTA** announces the following promotions: **NICOLE SUK**, to tax director, and **PAULA CROWE**, to tax manager. Also, receiving their CPA licenses, **JULIE KANG, YORIKO MATSUI**, and **BRADLEY SIENKIEWICZ**.

17,000
More than 17,000 ARNE user profiles have been created in the last 20 years.



Read updates from colleagues across the nation and post your latest brag-worthy news at CS.ThomsonReuters.com/AllAboutYou.



Here's a Bright Idea

INSPIRE your peers with fresh ideas, **READ** what firms like yours are facing, and **JOIN** a community of proactive accounting professionals eager to learn from one another. All this and more are yours when you sign up for a free web account at CS.ThomsonReuters.com/Community.



FOR PATSY PORTER, PRACTICE MAKES PERFECT

THE TOWN OF ATCHISON SITS ON THE WESTERN BANK OF THE MISSOURI RIVER IN NORTHEASTERN KANSAS. About six blocks from the river is the old fire station, built at the tail end of Atchison's manufacturing boom days in 1901. It's there you'll find Patsy Porter, CPA, PA, and her staff of nine preparing payroll, supervising audits, and supporting clients. Despite where they've set up shop, her firm is not in the practice of putting out fires. On the contrary, Porter's team concentrates on providing advice and services that keep clients' long-term success in mind.

Consider audits, for example. "We want to provide something more than just an audit, which is typically requested by someone else," the 20-year accounting veteran explains. "Instead, we hope to deliver services that will help clients in their day-to-day business activities, even after the audit is done."

Of course, stellar customer care requires—among other things—considerable commitment and even more organization. Until a few years ago, Porter and her staff made up for what the office lacked in technological efficiency with their dedication. The firm didn't have the right tools in place to optimize workflow. "We were so frustrated by our multiple brands of software, using various programs for

payroll, depreciation, accounting, tax preparation, and time and billing."

In June 2007, Porter discovered Thomson Reuters' CS Professional Suite, software and services designed for accounting and tax professionals. Porter recalls being particularly impressed with the paperless document management system. "We had just finished tax season and were exhausted. When I attended the demo and learned how FileCabinet CS integrated with other software to reduce the need for paper and storage, I almost cried."

The firm had used various tax and bookkeeping applications over the years, so Porter appreciated how

PATSY PORTER,
CPA, PA
FIRM FACTS

◆◆◆ **SERVICES** Patsy Porter's practice offers business consulting, financial reporting, income tax reporting and planning, small business accounting, auditing, and payroll.

◆◆◆ **WORKLOAD** Porter's office currently divides its time almost equally between audits, reviews and compilations, and tax services.

◆◆◆ **WEBSITE** Visitors to the firm's site, **papcpa.com**, can use useful tools such as financial calculators, a glossary, and an appointment scheduler.

◆◆◆ **SOFTWARE** Porter's firm currently uses FileCabinet CS, Practice CS, Fixed Assets CS, Client Bookkeeping Solution, Planner CS, and UltraTax CS.



Listen to Patsy's three tips for growing your own firm. Go to [CS.ThomsonReuters.com/Solutions](https://www.cs.thomsonreuters.com/solutions).

effectively the family of products worked together. “We didn’t have to bring multiple pieces of information together to prepare a tax return. And this meant we could spend more time serving our clients.” And less time, one might say, on administrative fire drills.

Consulting to the Rescue

Porter’s firm was enjoying a more streamlined and convenient workflow, but her sales representative, Paul Whitmore, sensed there was room for improvement. “I’m in touch with Paul all the time,” Porter says, “and he could tell we weren’t getting all the potential benefits we could out of CS Professional Suite.” Whitmore directed her to Thomson Reuters’ consulting services.

Enter Will Hill, senior client services consultant in Thomson Reuters’ Training and Consulting Services department. Hill and his colleagues help ensure

software users not only realize efficiencies in their day-to-day tasks, but also in their overall business model. “You have to know where you want your business to go in order to make the program work successfully for you,” explains Hill.

Porter’s situation wasn’t any different from most other firms, says Hill. “Patsy was struggling with Practice CS because the setup wasn’t right.” For Porter, Hill focused on structuring the firm’s input process correctly. “We took a careful look at what information was being put into the program to make sure staff could access meaningful data quickly and easily.”

Porter agrees, “Before consulting with Will, we were using Practice CS as a Rolodex. Now, all the information relating to one client is in one place. We don’t have multiple sources of information to update. If a



“Now that tax season is over, I’m looking forward to spending time on my hobbies—knitting, reading, and gardening.”

From Home to Historic Workplace

Patsy Porter’s practice began modestly. While raising her family and teaching college courses, she started working from a spare bedroom. Porter eventually moved to a small office in Atchison, Kan., and, when her firm outgrew the space in 2000, she took the opportunity to hang her shingle on the old fire station, an Atchison landmark dating back to 1901.

“After a new station was built, the old one was sold to the school district to house buses, followed by another owner who put an antique shop in it,” she says. “My current partner in the building bought an

interest in the old station and put his investment advisory services business in the portion where the horses lived. You have to remember that the first fire wagons were pulled by horses.”

Porter invested in the building in 2000 and remodeled the large garage area where the fire trucks and the school buses were kept. Sitting around the original fire pole under an original tin ceiling, she and her staff now feel a part of Atchison history.



client moves, one change in Practice CS will update everything!" As the owner of a small business, Porter appreciates the software's tracking capabilities. She can easily evaluate the profitability of a project, the performance of a staff member, and the status of tasks.

This year's tax period proved the value of Porter's investment. Despite having one less staff member than last year, the firm had its most successful season—with increased efficiency and, consequently, profitability.

How? Porter explains, "With Practice CS, we set up every project ahead of time and assigned staff to each phase of the project. This allowed us to plan out tax season in advance and be sure that no one person had more work than he or she could do efficiently. We were able to use staff members to their full potentials."

In fact, she estimates they increased the number of tax returns completed by 8 percent, but took less time. "I personally reduced my hours by about 20 percent."

When asked if the new software package and consulting was worth it, Porter says, "I can't imagine going back to the old software. I think my staff would quit!" •



↑ Back row, from left to right: Kimberly Clem, Patsy Porter, Kirk Porter, Melissa Myers, Sharon Schwarzer; Front row, from left to right: Colleen Meade, Ra'Chel Seever, Karen McConnaughey; Not pictured: Ron Lapp

Our **Consulting Services** at Work

Because there are many ways Thomson Reuters products can improve your firm's productivity and profitability, Director of Training and Consulting Jean Rakich recommends discussing software options with your account representative, who can put you in touch with a consultant early on.

To start the consulting process, your staff and the consultant review the office's culture and business model through telephone interviews and survey tools. Together, they determine major challenges and goals. An onsite visit helps further assess day-to-day realities and long-term wishes.

Once this stage is complete, the consultant brings findings back to the Thomson Reuters subject matter experts, who explore solutions for improving workflow and efficiency.

With a complete picture in hand, the Thomson Reuters team creates a list of best practices and recommendations, ranging from new data input methods to better software configurations. Targeted training is provided by Thomson Reuters, and typically the consultant will check in over the course of the following year.

1995

The year Patsy started the firm in her spare bedroom.

14 years

The length of time Patsy's first and longest client has been working with her.



Is your firm using its new software as effectively as it could be? Visit [CS.ThomsonReuters.com/Training](https://www.cs.thomsonreuters.com/training) for more information on how to maximize your investment.

join the network

AND

GET AHEAD

Social networking tools like LinkedIn, Facebook, Twitter, and Thomson Reuters' Accountant Resource Network (ARNE) are fast becoming a preferred way to track both friends and information. Recent studies show that people of all ages are joining in: A 2009 survey by management consulting firm Accenture found that baby boomers' patronage of blogs and podcasts is up 67 percent over last year.

Nevertheless, you're probably thinking, "What does social networking have to do with me and my business?" The answer is not much. Yet.

McCowan's pick for a password-management system, to his recap of the 28th Annual CS Users' Conference.

In the last year, the number of boomers using social networking sites has increased

59%

The data is convincing. Consumers of all ages are waking up to the possibilities of online networking, which means that your clients, colleagues, and competitors are heading to the web for this purpose—or will be very soon. If phenomena such as the Internet, email, and paperless workflow prove anything, the impact of social networking will be far-reaching, affecting every industry, business, and profession—including accounting. And those who do jump aboard the technology train will be well-positioned for the future of business.

This self-titled "practical technologist" concedes he doesn't have time to update his blog during tax season. And at this time, he doesn't consider social networking a replacement for in-person networking. "There's too much of a generational gap between small business clients and the current technology associated with social networking," McCowan explains. He enjoys using blogs to explore trends in technology and communicating with colleagues and clients, but can't project its specific revenue growth advantage quite yet.

The fastest growing segment of Facebook users is women

over 55

Small Steps

One easy way to reach out to clients electronically is through a blog, an online journal where readers can post replies. **Ryan McCowan, CPA.CITP**, entered the blogosphere with not just one, but three sites. Blogging provides McCowan an expansive forum for discussing how small accounting businesses can increase efficiency with practical technology solutions. Postings range from a Hamlet-inspired rambling on Windows XP and

Rob Carmines, CPA/PFS, CFP®, MST, recognizes the professional merit of social networking as a way to foster relationships with clients. The Virginia-based practitioner explains, "The initial benefit of social networking isn't drumming up new business, but enhancing connections with customers."

Potential clients will rarely pick an accountant from a list on the Internet, but increasingly, they're turning to the web to research their options. In fact, it's precisely



this social aspect of the latest tech tools that gives them moneymaking potential. "With Facebook," Carmines says, "we find out what's going on in each other's lives. The 'business' side will come, and I'm patient. I haven't picked up a client through the Internet, but I know the potential is there."

Whether or not you're a Facebook fanatic in your off-hours, you should still position your practice to take advantage of the networking technology.

Start Today

[1] Get Comfortable With It. Start acclimating to our tech-enriched environment and let it help you stay on top of trends. Check out industry blogs. Look for your firm's name or a topic of interest on Twitter. You can enter words to search at search.twitter.com.

[2] Create Your Online Identity. Another great way to begin is by joining LinkedIn, a social networking site used primarily by the business community. Or check out the Small Business Administration's version, community.business.gov/bsng, which launched in February 2009.

[3] Recruit and Reach Out. Take advantage of these online tools when you're interviewing potential employees or scouting new talent. Follow in the steps of Ernst & Young LLP, which started using Facebook to recruit college students for internships in 2007.

[4] Find the Value to You. Review your business and marketing goals, and then look for ways to support them with online media tools. Punch up your marketing effort by transmitting tweets when you update a tool on your website. Post interviews with satisfied clients or ask a staff member to write a blog on your firm's specialty.



RYAN MCCOWAN, CPA. CITP, owns Kentucky-based firm Green, McCowan & Co, PLLC, found online at gmccpa.com. Read his blogs at techsavvyfirm.com and techsavvystudio.com.



ROB CARMINES, CPA/PFS, CFP®, MST, is a founding partner of Carmines, Robbins & Company, PLC. Based in Newport News, Va., his firm prepares about 1,000 individual returns annually. Find him online at carminesrobbins.com.



Listen to Ryan McCowan recite his soliloquy on Windows XP, at CS.ThomsonReuters.com/Solutions.



MEET ARNE ONLINE Ease into the social networking sphere with Thomson Reuters' own online community, ARNE. Simple to use and designed especially for tax and accounting professionals, ARNE provides a chance to network with other Thomson Reuters users, as well as an opportunity to participate in online discussions and create user groups. You can even create your own blog. All that's needed to join the community is a free web account, which you can get at CS.ThomsonReuters.com.



WE HAVE THE ANSWERS

Advice for using your software to the best of its abilities—and to your benefit.



WRITE-UP CS

Q: Can I change the column order for account detail information at the bottom of my Chart of Accounts window?

A: Yes, the column order in the Account detail grid in the Chart of Accounts can be changed.

- ▶ In the **Chart of Accounts** window, choose **Edit / Options** and then click the **Columns tab**. To add columns to the Account detail grid, double-click a column name in the **Columns Available** pane to move it into the **Columns Selected** pane. If you want to remove any columns from the grid, double-click the column name in the **Columns Selected** pane.



ENGAGEMENT CS

Q: I have an existing engagement in Engagement CS that I would like to link to my engagements in PPC's SMART Practice Aids™. How can I accomplish this?

A: To link engagements between Engagement CS and PPC's SMART Practice Aids, highlight the engagement in Engagement CS, and then choose **Tasks / PPC / SMART Practice Aids**. At the prompt, choose the option to open an existing engagement, and then select the engagement to which you want to link in PPC's SMART Practice Aids.



PRACTICE CS

Q: I communicate through email with several contacts who are associated with one of my clients. Is there a way to view the email communications with all of the contacts on that client's dashboard?

A: Yes. By default, the Microsoft® Outlook® Mail portlet on the Client Dashboard searches your Inbox and Sent Items folders for email communications with the client. However, you can set up the Client Dashboard to search an Outlook public folder for email communications with contacts associated with that client as well. To set this up:

- ▶ Create a public folder in Outlook and copy or move the contact emails you would like to view on the dashboard into that public folder.
- ▶ Tell Practice CS the location of this folder by choosing **Setup / System Configuration / Outlook / Public Folder**. Mark the **Access Outlook Public** folder checkbox and navigate to the Outlook public folder you want to use. Choose **Setup / Clients** and select from the list the client whose email communications you want to view.
- ▶ On the **Contact** tab, add these contacts to the client under **Additional Contacts**. Now the email communications with the client and with the contacts associated with this client will appear in the Interactions portlet of the client dashboard.

56,107

Number of times
Thomson Reuters
Online Knowledgebase
cases were
consulted in 2008.

NOTE: The Outlook public folder and the Interactions portlet are found in the Client Management Module, for which licensing is required.



CLIENT BOOKKEEPING SOLUTION

Q: If I've already finalized a bank reconciliation, is there a way for me to delete it and start over?

A: Yes. Choose **Utilities / Administrator Utilities** and click the **Reset Checkbook Reconciliation Data** tab. Mark the checkbox in the Delete column for the reconciliation(s) you'd like to delete, and then click **OK**. The program unclears all transactions that were cleared during the reconciliation.



FILECABINET CS

Q: Is there any way to have my UltraTax CS client notes available in FileCabinet CS?

A: Yes. New for 2008, FileCabinet CS allows you to share drawer notes with client notes in UltraTax CS version 2008.x.x and Fixed Assets CS version 2008.x.x. When you first open a data location in FileCabinet CS, a one-time import process brings in client TIN information and all client notes. Conversely, if you add a note in FileCabinet CS, you can now view it in UltraTax CS or Fixed Assets CS.



GOSYSTEM TAX RS

Q: How do I go about entering a transfer of interest between partners?

A: Before entering a transfer, you must disable Auto Compute. **Navigate to Partner Information / Transfers of Interest / Transfers**, and perform the following steps:

- ▶ Double-click the **Add New Transfer Date** link and enter the date of the transfer (mandatory).
- ▶ Do one of the following:
 - ▶ To transfer interest from a single partner: Enter the partner number in the **Transferring partner number** field.
 - ▶ To transfer interest from two or more partners, leave the **Transferring partner number** field blank. To exclude one or more partners from being transferring partners, use the **Partners Excluded From Transferring An Interest** group box.
- ▶ If applicable, mark the **Withdrawing from**

partnership checkbox to indicate that the transferring partner is withdrawing from the partnership.

- ▶ Enter the partner number(s) of the receiving partner(s) in the **No.** column. If transferring to all partners, leave the receiving partner number blank. To exclude one or more partners from being receiving partners, use the **Partners Excluded From Receiving This Transfer** group box.
- ▶ Enter the transferring interest percentage for the transferring partner in the **Ratio** column. The interest percentage should be entered as a decimal. For example, if the partner is withdrawing from the partnership, enter **1.0**; if the partner is transferring half of his interest, enter **.50**.



GOFILEROOM



Q: GoFileRoom has a "three strikes" policy for account lockout. In accordance with this policy, a user is locked out of his or her account after three unsuccessful login attempts. When this occurs, a GoFileRoom administrator has to unlock the user's account. How can my users unlock their own accounts without administrator intervention?

A: If the user can receive email at the address that corresponds to his GoFileRoom login, he can unlock his account by completing the following steps.

- ▶ Visit the main GoFileRoom login page at **GoFileRoom.com/**.
- ▶ Click the **Forgot Password?** link, which is below the **Password** field.
- ▶ Click **OK** at the following prompt: "If you have forgotten your password and would like a new one emailed to you, click OK."
- ▶ GoFileRoom generates a new, temporary password for the user. This password is sent to the email address that corresponds to the user's GoFileRoom login.
- ▶ The user can log in to GoFileRoom using the new, temporary password. If the user is unable to log in to GoFileRoom after another three attempts, the GoFileRoom administrator must unlock the account manually.
- ▶ **Important!** If the user is a **Restricted Drawer owner**, performing this procedure will revoke his drawer ownership.

featured solutions in this issue

ACCOUNTING

-  Client Bookkeeping Solution
-  Engagement CS
-  Write-Up CS

DOCUMENT MANAGEMENT

-  FileCabinet CS
-  GoFileRoom

PRACTICE MANAGEMENT

-  Practice CS

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