



Practice CS, v.2013.2.0
User Bulletin 8009: Software Update

October 20, 2013

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 2013.2.0 of Practice CS includes the following enhancements.

System

- Phone numbers can now be formatted automatically according to your firm's preference by choosing Setup > Firm > Preferences and selecting a format under Contact setup options.
- A new user preference setting allows spelling to be checked automatically in Time & Expense Entry, Receipt & Adjustment Entry, and Billing.
- Performance of moving columns in grids has been improved.

Dashboards

- You can now enter and edit client notes directly on the Client Dashboard.
- You can now copy text from previously generated invoices directly onto new invoices via the new Composed Text tab in the Prior Invoices portlet of the Client Dashboard. To access this tab, mark the *Show Invoice Information* checkbox in the portlet.

Setup

- An *Open Projects only* checkbox has been added to the Projects tab of the Clients setup screen.
- You can use the field chooser to select which columns to view on the Projects tab of the Clients setup screen.
- The length of the CPA Information *Certification #* field in the Staff setup screen has been increased.

Billing

- You can now relieve nonbillable time and expenses automatically while billing billable time and expenses.
- An Undo button has been added to the toolbar in the Compose tab of the Detail Billing screen.
- Text on the Compose tab of read-only invoices can now be accessed and copied.
- Compose text will no longer be reset when the invoice bill amount is changed.
- Printing invoices to NetClient CS[®] no longer requires your firm to process credit cards through InterceptEFT.[®] If your firm does not have an account with InterceptEFT, your customers can view their invoices in NetClient CS.

- The height of the detail section of the Time & Expense and Nonbillable tabs of the Detail Billing screen is now remembered.

Time and expense entry

- Client name is now an available column when you make a selection in the Project and Task drop-down menus in the Time & Expense Entry screen.
- You now have the option to make Project a required field for your firm on time and expense entries.

Receipt and adjustment entry

You can now mark NetClient CS invoices as paid or unpaid directly from the Receipt and Adjustment Entry screen.

Reporting

Back, Forward and Refresh navigation buttons have been added to the preview in the Custom Formats screen.

Project management



- Projects can now be grouped and filtered by extension.
- Tasks can now have descriptions independent of the activity.
- Audit history is now available for projects and tasks.

Staff management

- Denied benefits will no longer be included in scheduled hours or show as scheduled on calendars.
- You can now define your own CPE accountancies and assign each its own list of applicable categories and types.
- You can now use a value of zero for comp time allowance factor when it is based on time of year.

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.