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DT PRACTICE

# Getting Started

DT PRACTICE™

part of the  
DT PROFESSIONAL SUITE



Sales: 800-663-7829, Option 4  
Support: 800-663-7829, Option 3  
DrTax.ca



THOMSON REUTERS

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## Welcome to DT Practice

With the advent of new technology for creating dynamic, integrated software applications, we saw an opportunity to provide our customers with a practice management product that would become a convenient “hub” for a firm’s everyday activities. The result is DT Practice, a software solution that combines powerful practice management tools with unprecedented flexibility and the convenience of integration between applications. DT Practice represents the future of practice management, where software adapts to the firm’s practices instead of imposing its own structure upon the firm.

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### What is practice management?

As a firm grows, the effort needed to carefully track clients, contacts, employee activities, billable hours, and other day-to-day aspects of an accounting practice can quickly become overwhelming. Practice management, then, is a strategy for minimizing the effort involved in staying on top of this information while simultaneously ensuring its accuracy and usefulness. The obvious way to accomplish practice management is through computer software designed specifically for the needs of today’s accounting firms, combining powerful features with flexibility, and providing functionality that enhances each employee’s ability to tackle the day’s tasks, from partners to associates to support personnel.

DT Practice is the latest tool for managing your practice, leveraging the power of the Microsoft® .NET computing platform to provide enhanced capabilities and ease of use in an application that will quickly become the centerpiece of your workstation’s desktop.

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### A vision of the integrated workplace

Imagine a single screen that could provide access to your mail, calendar, tasks, time entry, DT FileCabinet™ documents, and more. Imagine that you could not only view that information on a single screen, but work with

it as well. That is the vision of the integrated workplace, in the form of a digital “dashboard” and integrated “portlets” that place multiple sources of information together in a single, interactive setting.

Now imagine that you can customize a dashboard exactly the way you like it — and that you have a dashboard for each of your clients.

The dashboards and portlets of DT Practice make this vision a reality. Portlets are windows that provide up-to-date information drawn from other areas of DT Practice and even from separate applications. A dashboard is a screen that contains one or more portlets. You choose the portlets, and you choose how to arrange them within the dashboard.

Beyond the convenience of the dashboard, DT Practice provides comprehensive tools for managing all aspects of your practice, accessible via menu commands, a navigation pane, and the dashboards. You can choose to use the dashboards as much or as little as you want, to place only a few essential bits of information on them, or to fill them with everything you might need access to during the course of your day. It's up to you.

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## Key features

DT Practice enables you to perform the following tasks:

- Enter time and expenses
- Bill your clients
- Enter receipts and adjustments
- Assess service charges
- Print invoices, statements, reports, mailing labels, and letters

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## Other features

DT Practice offers an endlessly flexible interface through the use of “dashboards,” which you can configure to place multiple sources of information on a single, interactive screen.

When you use DT Practice in conjunction with DT FileCabinet and Microsoft Outlook® you can do all of the following from a DT Practice dashboard:

- Access your calendar
- Manage your tasks
- Monitor your email
- View documents stored in DT FileCabinet

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## How to use this guide

This guide provides an overview of the features available in DT Practice and detailed instructions for installing the application. Chapter 5, Processing Overview, also describes the core features of the application and lists other DT Practice guides available in PDF (portable document format) for you to learn about the application through hands-on exercises using sample data.

This guide provides information for:

- Installing DT Practice.
- Using the menu commands, toolbar, navigation pane, dashboards, and help.
- Understanding basic processing procedures such as entering time and expense information, billing, entering receipts and adjustments, running reports, managing projects and client tasks, managing clients and contacts, and backing up firm data.
- Setting up DT Practice to suit your firm's needs.
- Setting up DT Connect.™

The person who will set up DT Practice for your firm should follow the installation instructions in chapter 2, "Installation Instructions," which begins on page 5. That person, plus any partners or other personnel who will have high-level access to the application, should also read chapter 4, "Setting Up DT Practice," which begins on page 29. Employees who will use DT Practice will want to read "Processing Overview," which begins on page 101.

*Welcome to DT Practice*

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# Installation Instructions

This chapter provides a brief overview of the system requirements and more detailed information for the following tasks.

- Installing the application.
- Using DT Connect to download and install licenses and application updates.
- Logging in to DT Practice and opening the sample database.

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## System requirements

For information about the latest system requirements, please visit the system requirements page on our website at [DrTax.ca](http://DrTax.ca).

Note that DT Professional Suite applications are designed for professional production work. Our system requirements are based on the assumption that professional accounting firms replace their computer hardware and operating systems approximately every three years.

Although an application may operate on less powerful hardware and operating systems, we do not believe it will perform at a level suitable for production work in those environments. Of course, as processing speed and RAM are increased, application performance will also improve. We recommend business-class computers, which generally offer higher levels of performance than home models when running business applications.

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**Important!** You can install DT Practice on a supported network or on a local computer running the Windows® Vista (or newer) operating system with all of the latest service packs installed.

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## Overview of the DT Practice installation

To install DT Practice, you will perform the following procedures.

- **Select the DT location for the Practice shared files** — The DT Practice installation includes shared files that are used for integration with other applications, files that contain storage and configuration settings, and files that are required for workstation installations.
- **Enable remote entry** — If you want to allow your staff to enter information such as time and expenses while away from the office, activate the remote entry feature for your firm database.
- **Configure the database server** on which your firm database resides.
- **Install DT Practice** — Install or update DT Practice and the related components.
- **Install the license files** — Download and install your licenses via DT Connect.
- **Run desktop setup** — If you installed DT Practice on a network, run the desktop setup utility to perform a workstation installation on all other computers that will access the application.

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## Installing the application

The following sections describe how to install DT Practice and its license files, and how to run desktop setup for network installations.

- ***Important!*** To install DT Practice on a network, you must be present at the database server during the initial installation.
- ***Important!*** If your firm plans to install DT Practice in a terminal server environment, be certain to rely only on a terminal server professional who is certified and qualified to handle that type of installation.
- You can download and install DT Practice from our website. Because the download process involves a large amount of data, this process is recommended only if you have a high-speed internet connection. The installation process may require that you restart the computer on which you are installing the application. If you install DT Practice on a network, be certain that your network administrator selects a time to install when all other users have logged off the network

- To store data, DT Practice uses Microsoft® SQL Server® 2014 (including SQL Server 2014 R2 Express, which is included with the installation) or a newer version. If your firm uses an earlier version, DT Practice cannot be installed, and you will need to update your database server prior to installing the application.
- To make the DT Practice files and data available to user workstations, the computer where the shared files are installed (that is, the computer that is running SQL Server) must be turned on.
- To run DT Practice on a computer that has a firewall or that uses the Windows Vista® or Windows 7 operating system, you must create an exception within the firewall for the instance of SQL Server you use (recommended), or you must disable the firewall (not recommended). If you need assistance to create an exception for the instance of SQL Server you use, please refer to your firewall's documentation


Complete the following steps to install DT Practice to a network or to a standalone workstation. If you purchased a license for the network version and install the application files on the network, you need only perform this procedure once. You should then install the license files on the network and perform a workstation installation on all other computers that will access DT Practice (as described later in this guide).

1. Verify that you are logged in to your computer or server as an administrator.
2. Close all open applications, including anti-virus software that may be running in the background.
3. **Install from the Download page of our website.** Follow the instructions to save the installation EXE file for DT Practice to your local drive. Double-click the EXE file to start the installation wizard.
4. When DT Practice Setup starts, click the **Install DT Practice** link.
5. On the Welcome to DT Practice Setup screen, click Yes to verify that you are installing the application on the computer that you want to designate as the database server. Click Next to continue.

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**Note:** If you click the No, you will be prompted to start the installation again on the computer that will function as your database server.

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6. Read the DT Professional Suite License Agreement, mark the *I accept the terms in the License Agreement* checkbox, and click Next to continue.
7. For Installation Step 1, click Next to specify the folder location where the DT Practice shared files reside. DT Practice uses shared files for integration with other applications, for storage of configuration settings, and for workstation installation files. Click the  button, and navigate to the appropriate folder.
  - If you do **not** plan to run DT Practice on a network, this folder is usually **C:\WINCSI**.
  - If you do plan to run DT Practice on a network, select a shared network folder such as **X:\WINCSI** or **\\<name of network share>\WINCSI**.

Click OK, and then click Next to continue.

8. The setup wizard now provides the option to allow Remote Entry, which enables your staff to perform functions such as time and expense entry without a connection to your office network. If you want to allow Remote Entry, click the *Allow Remote Entry to be enabled on other computers* option and then click Next.
9. For Installation Step 2, click Next to configure this computer as the database server for DT Practice (which requires an instance of SQL Server). If your computer does not have an instance of SQL Server, only the *Install a new instance of Microsoft SQL Server 2014 R2 Express Edition SP1* option will be available for selection. If your computer already has SQL Server, you may use an existing instance or use the CREATIVESOLUTION instance.
  - To use CREATIVESOLUTION or another existing instance of SQL Server (which must be version 2014 or newer), mark that option, and click Next.
  - To install a new instance of Microsoft SQL Server 2014 R2 Express Edition, mark that option, and then click Next and specify a unique name for the new instance. Click Next to specify the folder where you want your DT Practice database to reside, which must be on the same computer where you install the software (you cannot select a network folder).



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**Note:** If a non-Express edition (Standard, Enterprise, etc.) of SQL Server 2014 or newer is already installed on your computer, we recommend that you select the existing instance to conserve both disk space and processing resources. If you choose to use a different instance or to install a new instance, be sure to back up your database before you continue. After you complete the installation, start DT Practice and restore the database. For more details, enter **Backing up a firm database** and **Restoring a firm database** in the search field on the DT Practice toolbar.

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Click Next to continue.

10. You may be prompted that the sample database already exists. Click *Yes* to replace the database with a fresh copy, or *No* to preserve your existing copy of the sample database.
11. For Installation Step 3, click Next, and then determine whether DT Practice should be installed on the computer that also functions as your database server. Choose one of the following options, as appropriate for your firm.
  - *Install DT Practice so that I am able to run it on this computer.* Click Next, and then continue to step 12.
  - *Skip installing DT Practice on this computer, this computer will be used as the DT Practice database server only.* Click Next, and then skip to step 13.
12. Respond to each of the installation prompts. You may need to restart your computer one or more times during this phase of the installation process.
13. The setup wizard displays instructions for steps you will need to complete for the setup of DT Practice on a network, and you can choose to save or print those instructions. (Note that you will need to run the desktop setup program from each computer that will run DT Practice.) Click Next to continue.
14. When the installation is complete, click Finish. To launch DT Practice immediately, leave the *Run DT Practice* checkbox marked.


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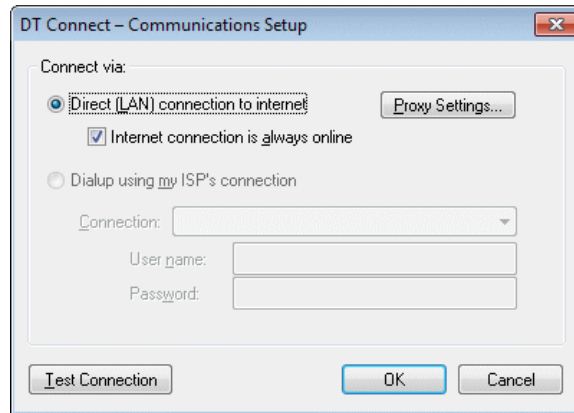
## Installing the licenses

After you install the application, the next step is to install the licenses for DT Practice. In most cases, you will use DT Connect to obtain and install the licenses. Complete the following procedure to install the licenses for DT Practice.

### Obtaining and installing licenses via DT Connect

DT Connect, which is installed automatically when you install DT Practice, provides a convenient and economical way for you to download both application and license updates via an active internet connection (or via modem).

1. Verify that you are logged in to your computer or server as an administrator.
2. Double-click the DT Practice shortcut icon  on your desktop (or click Start on the Windows taskbar and choose All Programs > DT Professional Suite > DT Practice).
3. Click Cancel to close the login dialog.
4. To open DT Connect, choose Help > About DT Practice, and click the Download Licenses button.
5. Enter both your firm ID (which is included on your mailing label) and either the ZIP code of your mailing address or the license PIN established by your firm, and then click Next.
6. If the Connect – Communications Setup dialog opens (as shown in the following illustration), you need to verify or select the various communications settings applicable to your system so that you can communicate with the Thomson Reuters data centers. For details, see “Setting up the communication configuration” on page 119. When you have finished verifying your communications settings, click OK to close the Connect – Communications Setup dialog.



7. In the DT Connect dialog, click OK. DT Connect logs in to the Thomson Reuters data centers and downloads your licenses.
8. Follow the remaining prompts to install the licenses.

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**Note:** At any future time, you can restart the process to obtain and install licenses via DT Connect. To start that process, choose File > DT Connect, mark the *Retrieve licenses* checkbox, and click the Call Now button.

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## Running desktop setup (for network installations only)

If you installed the shared files on a network, you must also run the desktop setup on **each workstation**. The desktop setup ensures that each workstation meets the minimum operating system requirements and confirms that all required components are installed.

The desktop setup adds to each workstation's desktop a shortcut to the single network installation of DT Practice (on your firm's server). This keeps all global files and data in a single location on the server. Network users should **not** install the full application on their own local workstations.

To run the desktop setup from each workstation, do the following.

1. Verify that you are logged in to your computer as an administrator.
2. Close all open applications.

3. Click Start on the Windows taskbar and choose Run.
4. In the Run dialog, enter **Z:\<path>\DT Practice\Desktop\Setup.exe** (where **Z** represents the mapped drive letter for the network path to the server on which you installed the shared files, and **path** is the path to your DT Practice folder). For example, if you installed the shared files in F:\WINAPPS\WINCSI, you would need to enter **F:\WINAPPS\WINCSI\DT Practice\Desktop\Setup.exe** in the Run dialog or **\\<name of server>\WINAPPS\WINCSI\DT Practice\Desktop\Setup.exe**.

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**Note:** If you need to uninstall the DT Practice desktop setup from a workstation, choose Start > Control Panel > Programs and Features, select DT Practice, and then click the Uninstall button.

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5. Click OK. The setup wizard installs or updates DT Practice and the necessary components. You may need to restart your computer one or more times during this step.
6. When prompted to enable or disable Remote Entry, click the desired option and then click Next.
7. Remote Entry requires a local installation of Microsoft SQL Server, version 2014 or later. If you chose to enable Remote Entry, you will be prompted to select an existing instance of SQL Server, or to install a new instance.  
  
Select an existing instance of SQL Server to use for Remote Entry, or click the option to install a new instance. Then click Next.
8. When prompted that the DT Practice setup has been successfully completed, click Finish.

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## Installing application updates using DT Connect


Occasionally, we issue updates for DT Practice via DT Connect, which is installed automatically when you install DT Practice. We strongly recommend that you use DT Connect to retrieve available updates on a regular basis.

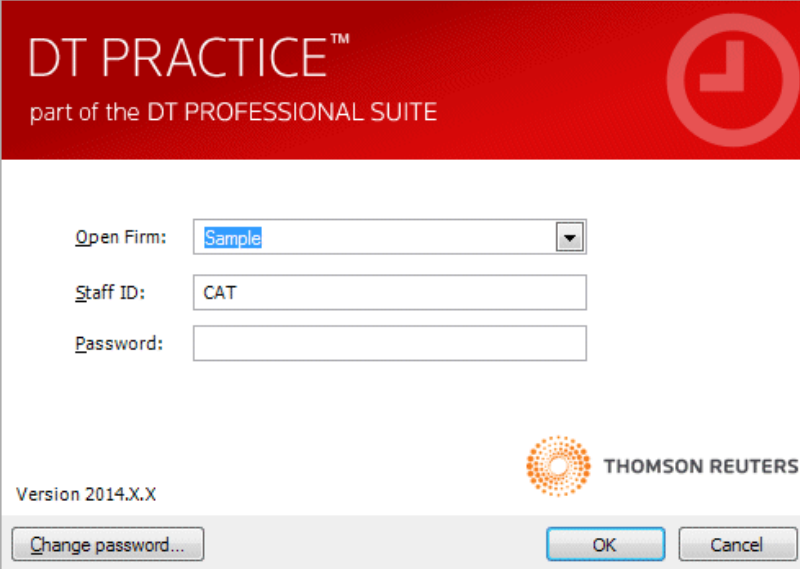
- ▶ To start DT Connect from within DT Practice, choose File > DT Connect.

**Note:** You can use the search  field in the toolbar to find more information about DT Connect.

## Starting DT Practice and attaching to the sample database

Follow these steps to log in to the application using the **Sample** database. You can use this example database to explore DT Practice while following this guide.

1. To start DT Practice, click Start on the Windows taskbar and choose All Programs > DT Professional Suite > DT Practice.
2. To log in, click the  button in the *Open Firm* field and select **Sample** from the drop-down list.
3. In the *Staff ID* field, enter **CAT**.
4. Click OK.



The image shows the DT Practice login dialog box. It has a red header with the text "DT PRACTICE™" and "part of the DT PROFESSIONAL SUITE". Below the header, there are three input fields: "Open Firm:" with a dropdown menu showing "Sample", "Staff ID:" with the text "CAT", and "Password:" which is empty. At the bottom left, it says "Version 2014.X.X" and "Change password...". At the bottom right, there are "OK" and "Cancel" buttons. The Thomson Reuters logo is also visible in the bottom right corner.

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## **Viewing and printing user bulletins**

We issue user bulletins to inform you about the following:

- Any issues related to the initial release of the application
- Changes made to the application
- Other relevant information

When you install DT Practice from a web download file, or when you use DT Connect to download and apply updates for the application, the DT Practice user bulletins topic opens automatically the next time you start DT Practice, and the most recent bulletins are listed near the top of that topic. Each bulletin is a separate file in portable document format (PDF) that you can view or print using your internet browser and Adobe Reader. (You can download and install the latest version of Adobe Reader free of charge from the Download page of the Adobe website.)

To view and print user bulletins at a later time, follow these steps.

1. Open DT Practice and choose Help > Bulletins. This opens the DT Practice user bulletins topic in the Help & How-To Center.
2. To open a PDF of the user bulletin for a specific release version or update, click the link for that version.
3. You can use the print features of your internet browser to print a user bulletin (or any help topic), or press CTRL+P on your keyboard.



# Application Overview

This chapter provides information about navigating within DT Practice and obtaining additional help with the application.

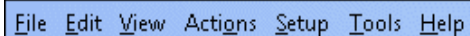
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## Navigation

In addition to standard Windows menus, DT Practice uses a navigation pane to maximize ease of navigation through the application.

## Menu bar

The menu bar at the top of the main window contains several pull-down menus, each of which contain numerous commands. These commands cause DT Practice to perform specific functions, such as opening a particular screen.



File Edit View Actions Setup Tools Help

The name of each menu includes one underlined letter. To open a menu, do either of the following:

- Click the menu name in the menu bar.
- Press the ALT key plus the underlined letter in the menu name. For example, to open the File menu, press ALT+F.

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**Note:** Arrows next to a menu command indicate additional menu choices. Click a command with an arrow to access the additional choices in the cascading menu.

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You can get an overview of the main features in DT Practice by displaying the commands of each menu. The menu bar includes commands to perform the functions listed in the table that follows. The availability of menu commands varies by security level.

Menu	Commands
<b>File</b>	Provides commands for opening, creating, and closing firm databases; importing data and custom formats; exporting data, contacts, custom formats, and other information; printing reports, labels, letters, invoices, and statements; backing up and restoring data, accessing DT Connect to download software updates; and closing the application.
<b>Edit</b>	Provides commands for undoing an action; cutting, copying, and pasting text; and checking spelling.
<b>View</b>	Provides commands for navigating through screens, toggling the navigation pane on or off, and viewing various dashboards and utilities.
<b>Actions</b>	Provides access to most major functions in DT Practice. The menu provides commands for entering time and expenses, billing, receipt / adjustment entry, assessing service charges, and advancing to the next period. If you are licensed for the Project Management, Client Management, and Staff Management add-on modules, the menu contains additional commands for managing projects, clients, and staff. The availability of some commands depends on the user's security level and product licensing.
<b>Setup</b>	Provides commands for setting up DT Practice for your firm, including information for your firm, offices, staff members, activities, and clients, plus setup for security groups, groupings, custom fields, engagement templates, taxes, service charges, staff rate descriptions, recurring bill descriptions, bank accounts, standard text, custom formats, custom dashboard portlets, system configuration, and user preferences. If you are licensed for the Project Management, Client Management, and Staff Management add-on modules, the menu contains additional commands for setting up project templates, tracking descriptions, client retention descriptions, staff skill areas and ratings, and CPD course sponsors. The availability of some commands depends on the user's security level.
<b>Tools</b>	Provides the Update Statistics command, which can be used to ensure that your database is providing data to DT Practice as efficiently as possible. Also provides commands to check the database for corruption problems and to set an alternate application date for training purposes.
<b>Help</b>	Provides commands for opening the DT Practice Help & How-To Center and using the help, visiting our website, contacting Support, sending log files via email, viewing user bulletins, and viewing information about your DT Practice version.



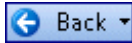





### Tips







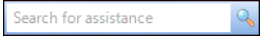

- Some of the menu commands have corresponding buttons on the DT Practice toolbar, as well as corresponding links in the navigation pane.
- Several of the most commonly used menu commands have special shortcut keys that allow you to execute the commands quickly from your keyboard. For example, press CTRL+T to open the Time and Expense Entry screen.

## Toolbar

The toolbar, located beneath the menu bar, contains buttons that facilitate navigation through the application and perform various tasks.





Button	Action
	<b>Back:</b> Displays the screen you last visited. Click the down arrow to view a list of recently visited screens, from which you can make a selection by clicking.
	<b>Forward:</b> Returns to the screen from which you clicked the Back button. Click the down arrow to view a list of screens from which you clicked the Back button. Click to select a screen to view.
	<b>Refresh:</b> Refreshes the screen. This is helpful because it allows you to view the most current information. DT Practice also executes this command periodically on its own.
	<b>Home:</b> Opens the Home Dashboard.
	<b>Firm Dashboard:</b> Opens the Firm Dashboard.
	<b>Staff Dashboard:</b> Opens the Staff Dashboard.

Button	Action
	<b>Client Dashboard:</b> Opens the Client Dashboard.
	<b>Favorite Screen:</b> Opens the screen you have selected as your favorite in Setup > User Preferences > System tab. If you have no favorite screen selected yet, the application will prompt you to select one when you click this button.
	<b>Update Remote Entry Firm:</b> Updates the remote entry firm on the current computer using the selected filter. <b>Note:</b> This button appears only if your firm uses Remote Entry and you have previously created a remote entry firm.
	<b>DT Connect:</b> Opens DT Connect, which you can use to download and apply license or application updates.
	<b>DT FileCabinet:</b> Opens DT FileCabinet (if licensed).
	<b>Add:</b> Enables you to add Outlook items, projects, and client interactions, such as a notes, phone calls, phone messages, or emails. You can also schedule phone calls, meetings, and to-do items, add CPD courses, and enter benefit information, such as sick time. Availability of these options depends on whether your firm is licensed for various add-on modules, such as Staff Management.
	<b>Search for assistance:</b> Enter keywords to search the Help & How-To Center for relevant topics. See <a href="#">Finding answers to your DT Practice questions</a> for more information on performing searches in the help.
	<b>Help:</b> Located on the far right side of the toolbar, this button opens the topic associated with the current screen, or a list of relevant topics (if more than one topic applies to the current screen).

## Navigation pane

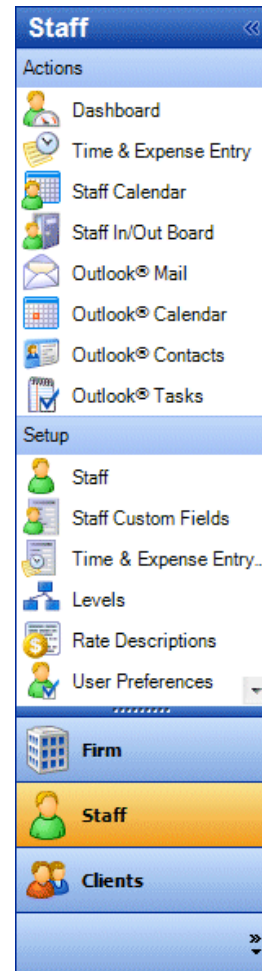
The navigation pane provides a convenient means of access to the various tasks and views in DT Practice. At the bottom of this pane are buttons you can click to switch the pane's view between *Firm*, *Staff*, and *Client* options. The *Staff* options are shown here.

Click the  or  button to minimize or expand the navigation pane. When the navigation pane is expanded, it remains open on the left side of your screen. Minimizing the navigation pane creates more room for the workspace. You can click the minimized navigation pane once to temporarily display the action and setup icons. Click it again to hide them.

Click the Firm, Staff, and Clients buttons to change the options displayed in the navigation pane. When you click the Firm button, icons for firm-related actions and setup options are displayed. Similarly, clicking the Staff or Clients button displays icons for actions related to staff or client information.

If the list of available actions is longer than the available space, scroll buttons will appear to enable you to scroll through the list.

Click any of the items in the Actions or Setup lists to perform the related action.



## Dashboards

A “dashboard” in DT Practice is a configurable workspace that you can customize to display multiple sources of information at once. Like the dashboard in your car, which may provide information about your speed, RPMs, engine temperature, fuel level, and more, a DT Practice dashboard can provide a wide variety of information at a glance, such as a client historical data, time entry information, calendar, lists of tasks and email, time entry information, and more. The dashboard provides an overview of numerous integrated sources of information, and is customizable to fit your needs.

DT Practice provides dashboards for firm, staff, and client information, along with a Home dashboard that you can set up to provide easy access to news feeds and other web-based resources for both your firm and your DT Professional Suite software.

### Setting up a dashboard

To familiarize you with the concept of the dashboard, let's set up a Staff dashboard in DT Practice.

1. Choose View > Staff Dashboard.
2. Click the **Select Portlets** link in the upper right corner of the dashboard (or right-click within the dashboard and choose Select Portlets from the context menu).
3. In the Select Portlets dialog, mark the checkbox for the item you wish to add to the dashboard and click OK.

A window (or "portlet") opens within the dashboard corresponding to the selection you made.

4. Add more portlets by repeating steps 2 and 3 above and marking one or more additional checkboxes.

---

**Note:** To remove a portlet from a dashboard, follow the steps above and unmark the checkbox for that portlet.

---

### Customizing the dashboard

As you add items, new portlets appear on the dashboard, forming multiple columns which may be difficult to see as they get narrower with each added portlet. Fortunately, you can customize the layout of the dashboard to make the collection of portlets easier to see.

To change the layout of a dashboard, click the title bar of a portlet you want to move, hold down the left mouse button, and drag the portlet to a new location. You will see a shaded area appear when the portlet is positioned correctly for placement; release the left mouse button to "drop" the portlet in its new location.

You can arrange several portlets on the screen, in a mixture of rows and columns, simply by dragging and dropping them. Once the portlets are in place, you can resize them by placing the cursor between two portlets, clicking and holding the left mouse button, and dragging the boundary in either direction, as shown below.



### Adding dashboard views

To further customize a dashboard, you can add additional dashboard “views,” which appear as tabs at the top of the dashboard. By spreading portlets across multiple views, you can maximize the amount of information you can view in each dashboard.

1. Click the **Add View** link in the top right corner of any dashboard (or right-click and choose Add View from the context menu).
2. In the Add View dialog, enter a description for the view. This description appears in the tab at the top of the dashboard.
3. Click OK. A new tab is added to your dashboard.
4. Click the new tab to access the view you just added. You can add portlets and customize this view as you would the main view.

---

### Notes

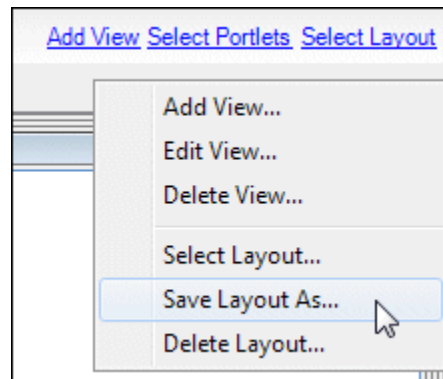
- Any additional views that you create for the Client Dashboard are applied to all clients.
  - You can rename any view by right-clicking and choosing Edit View from the context menu.
  - If you want to move a portlet from one view to another, remove it from the first view and add it to the other view, using the steps in “Setting up a dashboard” on page 20.
-

### **Saving dashboard layouts**

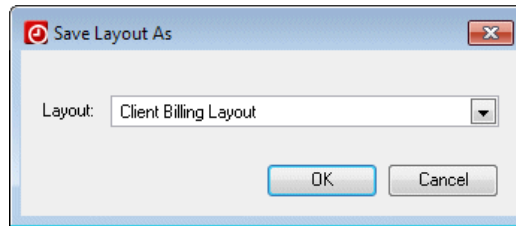
Dashboard layouts provide a way for you to save dashboard configurations. There are several reasons why you may find these saved layouts useful.


- If you accidentally delete some of your dashboard views and then close DT Practice, you may not be able to remember the layout and portlets that you were using. A saved dashboard layout gives you an easy way to restore the dashboard layouts that you want.
- You may want to design one or more standard layouts for the firm that everyone in the office should have. Instead of setting them up for each staff member, or explaining how to set them up, you can create and save the layouts to share with others.
- You can assign default dashboard layouts to new staff that you hire, to save time setting up their dashboards.
- You may find it convenient to choose a dashboard layout throughout the period based on the work you are doing. Saving standard layouts allows you to easily change to a layout that fits the task at hand (billing, analysis, and so on).

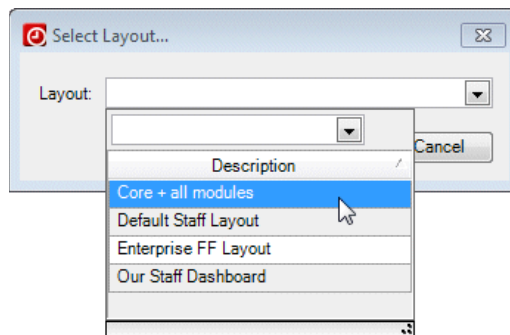
To save a dashboard layout, right-click the dashboard and choose Save Layout As from the context menu.



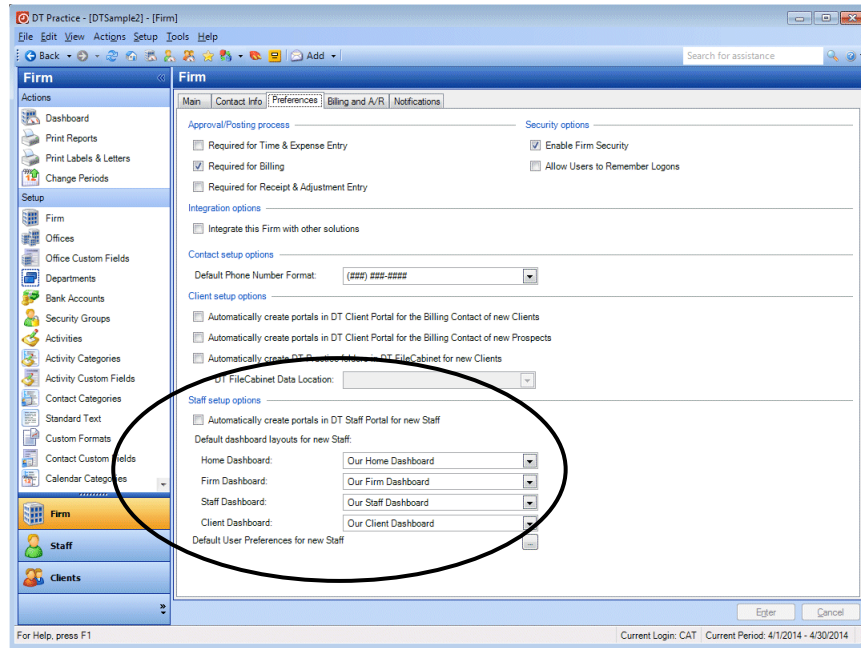
In the Save Layout As dialog, enter a name for the layout and click OK to save it.



Layouts that you have saved are available by clicking the **Select Layout** link at the top of the screen. Click the  button to select a saved layout from the drop-down list.



**Note:** You can select the default dashboard layouts for new staff on the Preferences tab of the Firm setup screen.



## Getting help

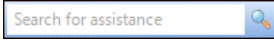

The online Help & How-To Center provides one-stop access to information about using DT Practice.

**Note:** You need an internet connection to access the Help & How-To Center, which is compatible with the latest versions of most web browsers.

## Finding answers in the Help & How-To Center

The Help & How-To Center provides extensive information about using DT Practice, including procedures for completing various tasks, answers to frequently asked questions, tips for increasing productivity and troubleshooting issues, alerts about timely issues, details on new features and more.



- ▶ You can access the Help & How-To Center from within DT Practice by any of the following methods.
  - Use the search field  in the toolbar to search for relevant topics.
  - Click the  button to open a topic that describes the current screen.
  - Press CTRL+Y or F1 to view help that is relevant to the current screen.
  - Choose Help > Help & How-To, which opens the topic Browse subjects for DT Practice.

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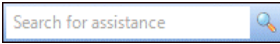

**Tip:** You can print a topic via your web browser's print feature.

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### Searching for information

The most efficient way to locate information is to take advantage of the robust search engine upon which the Help & How-To Center is built: the Google search engine. When searching for information in the Help & How-To Center, you can use the same strategies you use when you use Google to search for general information on the internet.

Search fields for searching the Help & How-To Center are accessible from two locations.

- **From within DT Practice:** Use the search field  in the toolbar.
- **From within the Help & How-To Center:** Use the search field  near the top of the topic.

Simply enter a search term or phrase and press Enter to see a list of related topics that apply to DT Practice.

For more information, see the [Finding answers for DT Practice](#) topic in the Help & How-To Center.

### Browsing topics by subject


In the Help & How-To Center, click the Browse Subjects button to view a list of categories, then click a category to view a list of related topics.

### Viewing an index of keywords

In the Help & How-To Center, click the Index button to view an alphabetical list of keywords. Click a keyword to view the associated topic.

### Accessing context-sensitive help

As its name implies, context-sensitive help describes the specific area in which the cursor is currently located. In DT Practice, you can access the overview topic for the current screen or dialog by pressing F1 or

CTRL+F1. You can also click the  button on the far-right end of the toolbar and select the top item from the menu.

If additional topics are related to the current screen or dialog, you can click the help button and choose an item from the menu of relevant topics.

### Getting help from Support and other resources

The Help & How-To Center, which is accessible by choosing Help > Help & How-To if you have an active internet connection, should answer any questions you might have about DT Practice. We encourage you to use this resource whenever you encounter questions while working in DT Practice. However, if you need to contact Support or want to explore training and other resources, you can do so by one of the following methods.

#### Access the Support page of the DT website

- ▶ Choose Help > Additional Resources > Product Support to access the Support page of the DT website.

#### Support

If you have questions that are not answered by this guide, the help, or our website, please call Product Support at 800-663-7829, press **3**, and listen to the available options.

You can get optimal service and use your telephone time most efficiently if you have a very specific explanation of the issue when you make the call. You might want to write brief notes on some of the symptoms occurring on the computer or print out any error messages related to the issue. Your notes might include the following:

- The version number of the application you are using. (To obtain this information, choose About DT Practice from the Help menu.)

- The operating system that you are using.
- The specific nature of the issue.
- The steps that preceded the issue.
- Whether this issue occurs with more than one client or on other computers.
- The full error message and when it occurs.

**Access the DT website**

- ▶ Choose Help > On the Web and click the DT Max Suite Home Page link. This page includes access to information and resources for all DT Max Suite applications.

*Application Overview*

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## Setting Up DT Practice

This chapter provides instructions for setting up the application prior to using it for processing. Though no two firms are the same, performing the setup tasks presented in this chapter will help you to derive maximum benefits from DT Practice.

In this chapter we present a sequence for setting up the application that you can use as a general guide for your firm's setup, and we explain how many of the setup tasks relate to later tasks or processes. Though much of the setup process for DT Practice can be performed on the fly while setting up other areas of the application, we will proceed through application setup in a logical sequence that will work for a typical firm. We recommend that you follow this sequence as you set up your own installation of the application.

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### Sample data

The examples in this chapter use the Sample database that comes with DT Practice. If you want to follow along with the procedures in this chapter, we encourage you to do so using Sample so that you can practice these setup steps without affecting your firm's database.

---

**Note:** You cannot transfer data from one DT Practice database to another.

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DT Practice also includes a database called **SetupDatabase.bdf** that you may find useful when first setting up your firm. This database contains some of the same information as the Sample database, without client, accounts receivable, or WIP data. Using this database can help you set up your firm's database without starting completely from scratch.

If you want to use SetupDatabase.bdf as the starting point for setting up your firm's database, you will need to restore the database through DT Practice. The database can be found on the DT Practice CD or in the download folder in a subfolder named Data. To restore the database, open DT Practice, choose File > Restore, navigate to the Data folder,

select the database, and click OK. You must then assign it a name in the *New Firm* name field, and click OK to restore the database to DT Practice.

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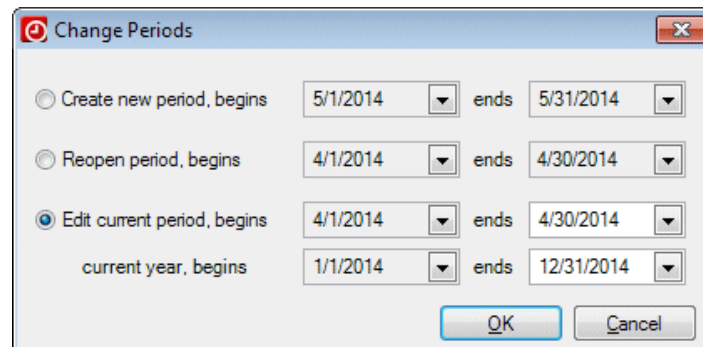
## Initial setup tasks

Before you begin setting up the core components of DT Practice, there are a few items that you should consider setting up first. Performing these tasks now will better prepare you for other setup tasks that you will perform later.

### Changing periods

Before you begin application setup, it is a good idea to set the application's processing period to the period before you plan to begin processing (you will roll the dates to that period later).

1. Choose Actions > Change Periods.
2. In the Change Periods dialog, edit the dates for your firm's current year.
3. Edit the current period to the dates for the period prior to when you plan to begin using DT Practice for processing.

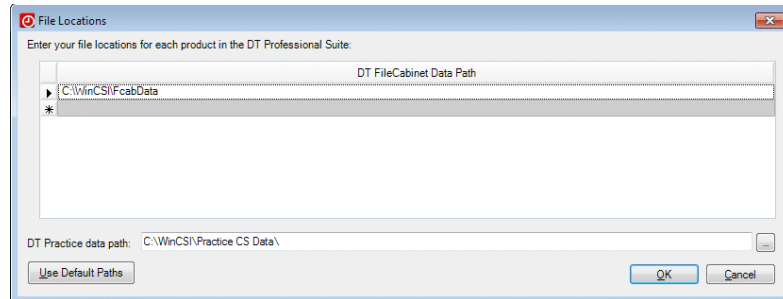


4. Click OK when finished.

### Specifying file locations

In the File Locations dialog, you can direct DT Practice to the data location for DT FileCabinet. This data location must be entered if you plan to share data between DT Practice and DT FileCabinet.

1. Choose Setup > System Configuration > File Locations.



2. Click the field for the DT FileCabinet Data Path, then click the Browse button next to that field and navigate to the appropriate folder in the Browse For Folder dialog.

---

**Tip:** If your firm used the default installation folders for DT FileCabinet, click the Use Default Paths button.

---

3. Click OK to close the Browse For Folder dialog, and click OK again to close the File Locations dialog.

---

**Note:** If necessary, you can specify multiple locations for another application's data. Use the extra rows in each column to specify additional data locations.

---

## Choosing default invoice and statement formats

When performing later setup tasks, it will be helpful to have selected default invoice and statement formats for all new records. You do not necessarily have to customize those formats now — you can merely name the default formats, then customize them later.

1. Choose Setup > Custom Formats.
2. In the Custom Formats screen, add new invoice and statement formats that you will use as your firm's default formats.

For now, you can add placeholder invoice and statement formats that will serve as your defaults. Later, you will customize these formats for your firm. For more detailed information on customizing formats, see "Customizing invoice and statement formats" on page 91.

To add your default formats, right-click within the formats list and choose Add Invoice or Add Statement. The Format Wizard opens to the Main tab.

3. In the Main tab, enter the name for the format (e.g., Standard Invoice).
4. If desired, click Next on each screen of the wizard and modify the information as appropriate. You can return to the Format Wizard later if necessary.
5. Click Finish to close the Format Wizard.

Repeat steps 2 through 5 above to create additional formats as necessary. You will want to add at least one invoice format and one statement format before continuing application setup. When you set up firm information, you will designate default invoice and statement formats that will be assigned automatically to each new client record that you add to DT Practice.

### Setting up service charges

If your firm assesses service charges on past due client balances, the firm administrator (or staff member with security permission to add and edit billing information) should enter service charge information into the application. When you set up firm information, you will be able to enable service charges and to designate a service charge to serve as your firm's default.

1. Choose Setup > Service Charges.
2. Click the Add button.
3. Enter an appropriate description for the service charge in the *Description* field.

The description you enter should be easily identifiable by anyone applying service charges.



- In the *Annual Rate* field, enter a rate as a percentage (up to four decimal places).

Use the remaining fields to enter additional attributes for the service charge, as appropriate.

### Notes

- An asterisk appears in the title bar of the application when you have made changes to a screen but have not yet re-saved that screen.
- You can add, edit, or delete service charge entries on the fly by right-clicking in a related field elsewhere in the application and choosing the desired action from the context menu. An example of such a field is the *Assess Service Charges, use rate* field in the Billing tab of the Client setup screen.

## Setting up links

You can link some items in DT Practice to documents, folders, web pages, interactions, or DT FileCabinet documents. Links can be added for clients, engagements, engagement templates, projects, project templates, tasks, task templates, invoices, and statements.

To add a link, follow these steps.

1. Open the screen or dialog for the item (for example, the Project dialog) and click the Links tab.
2. Right-click within the Links tab and choose the appropriate command from the context menu:
  - Add Files
  - Add Folder
  - Add Web Page
  - Add Interactions
  - Add DT FileCabinet Document
3. Navigate to and select the item to which you want to link, then click OK. (For files, click Open.)

### Setting up custom fields

DT Practice offers the ability to set up custom fields and groupings for offices, staff, activities, clients, engagements, projects, and tasks. These custom fields enable you to further customize the application based on your firm's unique needs, providing the flexibility to track any type of data you want and to report by groupings not currently offered in the application.

If your firm needs a way to track additional information for offices beyond that already provided on the Offices setup screen, you can add custom fields to track this information. For example, if you would like a custom field listing cross streets for the various offices, follow these steps.

1. From the Setup menu, choose Custom Fields > Offices.
2. In the Office Custom Fields screen, click the Add button.
3. In the *Description* field, enter **Cross streets**.
4. In the *Type* field, select the field type from the drop-down list. Available field types are checkbox, date, list, number, staff list, and text. For this example, select **Text**.
5. Enter a numeral in the *Length* field to specify the maximum number of characters you can enter in the text field (up to 4000).
6. Click the Enter button to save the custom field.

The custom fields that you add are available in the Custom Fields tab of the Offices, Staff, Activities, and Clients setup screens.

**Note:** For each of the core setup areas except Firm (Offices, Staff, Activities, and Clients), you can set up an unlimited number of custom fields.

## Firm setup

Use the Firm setup screen to enter information about your firm and to enable features of the application that your firm will use. When you have finished entering information on all tabs, click Enter to save your changes.

- ▶ To open the Firm setup screen, choose Setup > Firm.

## Main tab

On the Main tab, enter your firm's name and SIN/BN.

## Contact Info tab

On the Contact Info tab, enter information for your firm's home office. If you set up multiple offices for your firm, the information entered here will

be shared with the office you designate as your home office. See “Setting up offices” on page 46 for more information on setting up offices.

**Categories**

For more information on contact categories and setting them up in DT Practice, see “Setting up groupings” on page 48.

**Additional Contacts**

You can set up an unlimited number of additional contacts for the firm. For example, your firm may have business affiliates, such as the firm's attorney, with which staff need to communicate frequently. You can set up the affiliate as a firm additional contact so that their contact information is available to anyone in the firm with the proper security.

## Associations

Use the Associations section to associate a contact with other clients, staff, and offices in DT Practice. When you associate a contact with a client, staff member, or office, that contact becomes an additional contact for that entity. By creating associations between contacts, you can access all additional contacts in one place, giving you the ability to look up any contact to see which other clients, staff, or offices they are associated with. You can also set up business associates (such as a law firm or bank) just once in the application.

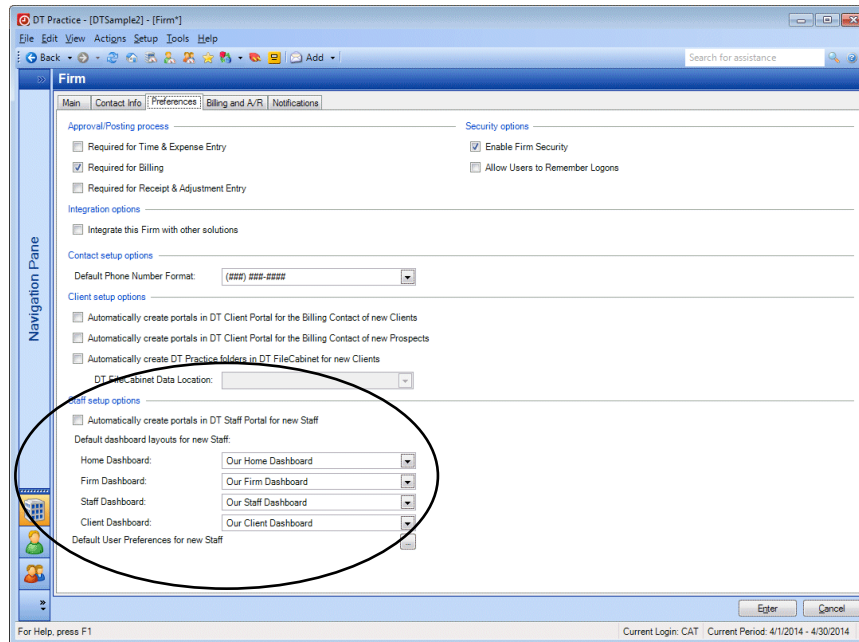
The screenshot displays the 'Firm' contact record in the DT Practice application. The interface includes a navigation pane on the left and a main content area with several tabs: 'Main', 'Contact Info', 'Preferences', 'Billing and A/R', and 'Notifications'. The 'Main' tab is active, showing fields for Name, Title, Company, Salutation, File as, Business, Home, Mobile, City, Province, Postal Code, and Country. The 'Associations' section is circled in red, showing a list of associated contacts: Michigan Office, California Office.


## Preferences tab

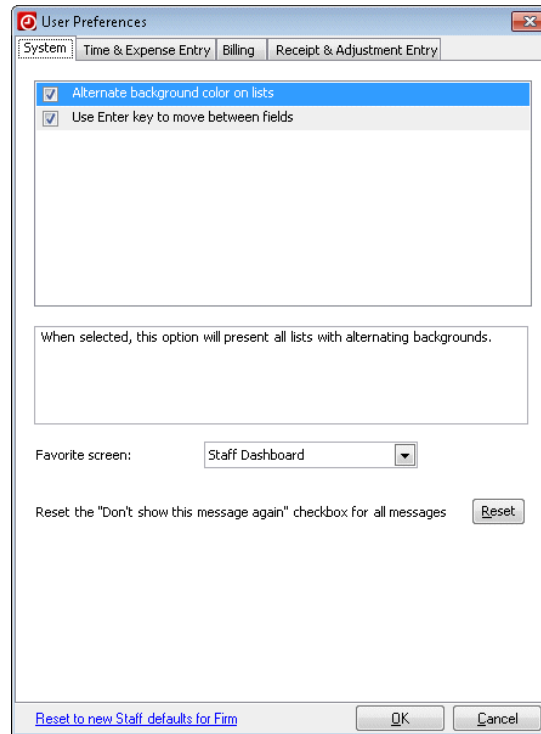
Use the Preferences tab to activate the approval and posting process for time and expense entry, billing, and receipts. You can enable firm security by requiring a password to log into the application, and allow staff to have the application remember their passwords. You can also indicate whether the current firm database should be integrated with other DT Professional Suite applications. If your firm is licensed for DT Firm Portal,™ you can choose whether to automatically create DT Client Portal™ or DT Staff Portal™ portals when adding new clients, prospects,

or staff to DT Practice. Mark the checkbox next to each item you wish to enable.

In the Staff setup options section, your firm can assign default layouts for the Home, Firm, Staff, and Client dashboards.

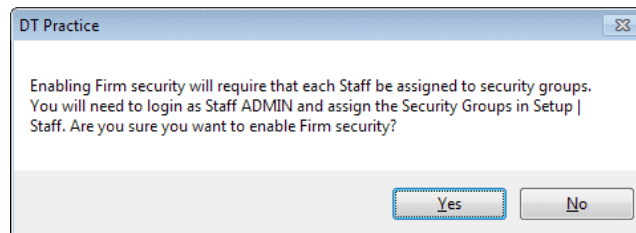


You can also click the browse  button to choose the default user preferences for new staff. These firm preferences provide a convenient way to assign a specific setup for new staff without having to do so on an individual basis.



### Enabling firm security

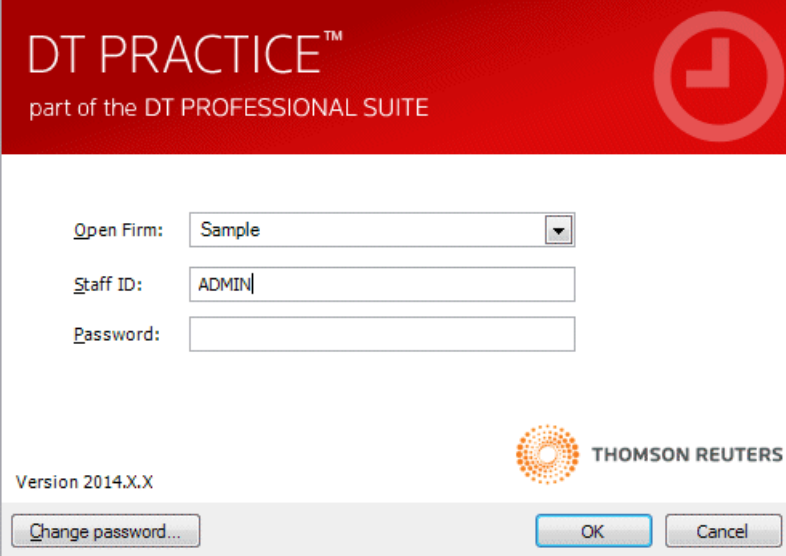
1. On the Preferences tab of the Firm setup screen, mark the *Enable Firm Security* checkbox.
2. Click the Enter button.
3. The application will prompt you to log in as ADMIN and assign all staff to security groups. Click Yes.



4. From the File menu, choose Close Firm.

### Creating the firm password

1. From the File menu, choose Open Firm.
2. In the login dialog, enter **ADMIN** in the *Staff ID* field and click OK.



The image shows a login dialog box for DT PRACTICE. The title bar is red with the text "DT PRACTICE™" and "part of the DT PROFESSIONAL SUITE". Below the title bar, there are three input fields: "Open Firm:" with a dropdown menu showing "Sample", "Staff ID:" with the text "ADMIN" entered, and "Password:" which is empty. At the bottom left, it says "Version 2014.X.X". At the bottom right, there is the Thomson Reuters logo and the text "THOMSON REUTERS". At the very bottom, there are three buttons: "Change password...", "OK", and "Cancel".

3. Because this is the first time you have logged in since you enabled firm security for the Sample firm, the application will prompt you to create a password. For this exercise, enter **password** (all lower case) in the *New Password* field. Enter **password** again in the *Confirm New Password* field.



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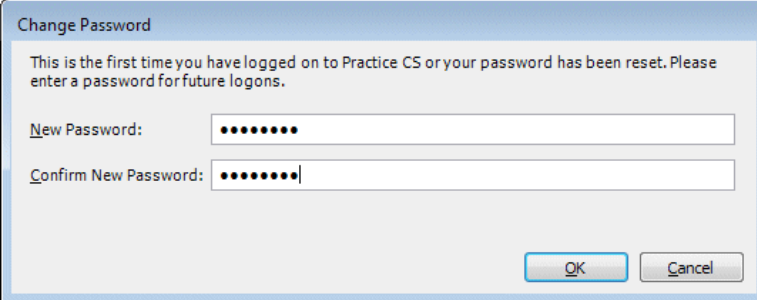
**Notes**

- Passwords are firm-specific. Changing the password for the ADMIN account in the Sample database will not affect the password for your firm’s database.
- You should choose a “strong” password for your firm database’s ADMIN account — something that is not easily guessed and contains a combination of numerals and upper- and lower-case letters. Any password you create should be something that you can easily remember.

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Setting up security levels will be discussed further beginning on page 50.

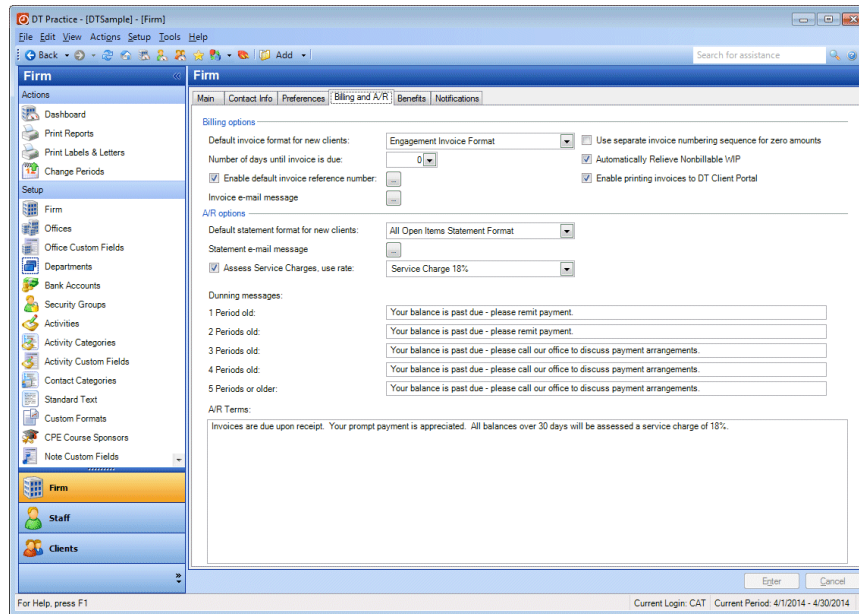
4. Click OK.



The image shows a 'Change Password' dialog box with a light blue title bar. The main text reads: 'This is the first time you have logged on to Practice CS or your password has been reset. Please enter a password for future logons.' Below this text are two text input fields. The first is labeled 'New Password:' and contains seven black dots. The second is labeled 'Confirm New Password:' and contains seven black dots. At the bottom right of the dialog box are two buttons: 'OK' and 'Cancel'.

## Billing and A/R tab

Use the Billing and A/R tab to set firm defaults for invoices, statements, and service charges. You can also enter up to five different dunning messages corresponding to the number of periods a balance is outstanding, and enter text that describes your firm's accounts receivable terms.



In the *Default invoice format* and *Default statement format* fields, choose the formats that you added previously in “Choosing default invoice and statement formats” on page 31. These formats will be added by default to all new client records you create, though you can override the default selection. The value you enter for number of days until the invoice is due will also be the default for new client records.

If your firm assesses service charges, mark the *Assess Service Charges, use rate* checkbox and choose a default service charge from the accompanying drop-down list, which will be the default value added to new client records. Then enter dunning messages and A/R terms in the appropriate fields.

## Benefits tab

If your firm is licensed for the add-on Staff Management module, a Benefits tab appears on the Firm setup screen.

## Notifications tab

If you are licensed for the Project Management, Client Management, or Staff Management modules, the Firm setup screen will also have a Notifications tab. Please see “Setting up notifications” page 77 for more information.

## Setting up taxes

DT Practice includes two tax-related items for you to set up: taxing authorities and tax areas. Taxes that you set up in DT Practice can be applied to your firm’s invoices quickly and easily.

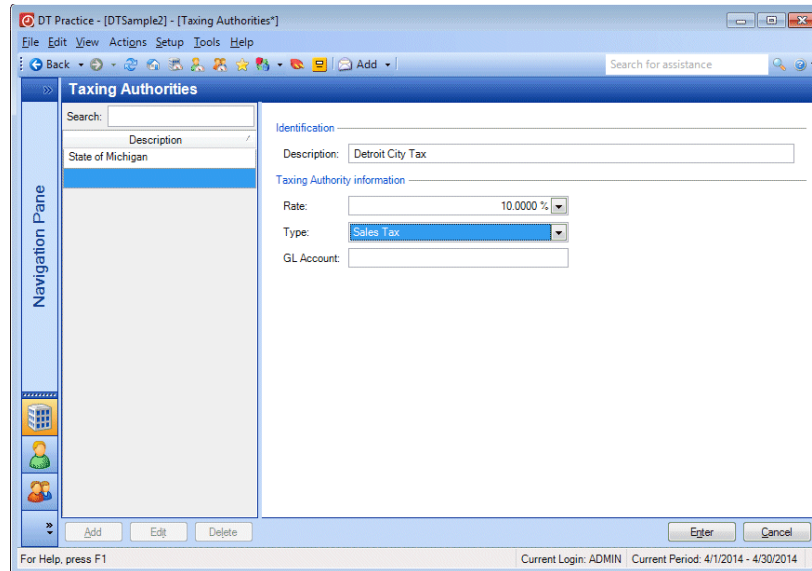
### Setting up taxing authorities

Use the Taxing Authorities setup screen to set up various provincial and local sales and service taxes to be applied to your firm’s invoices. You may need to set up different taxes depending on where your firm or client does business, whether there are provincial and/or local sales taxes, and whether there are applicable service taxes.

Taxing authorities are a subcomponent of tax areas, and must be set up first. Multiple tax authorities can be combined into tax areas that are assigned to clients and consist of all the taxes your firm must charge to clients for a specific location or type of work.

1. Choose Setup > Taxes > Taxing Authorities.
2. Click the Add button.
3. Enter a unique description for the taxing authority in the *Description* field.
4. Enter the tax rate in the *Rate* field.

5. In the *Type* field, indicate whether the tax is a sales or service tax.



6. Click Enter to save.

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**Note:** You can add, edit, or delete taxing authorities on the fly by right-clicking in a related field elsewhere in the application and choosing the desired action from the context menu.

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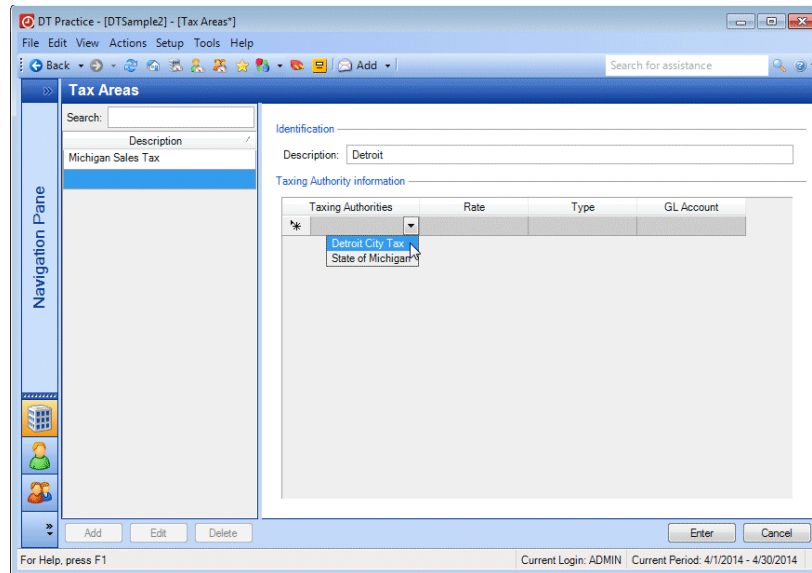
### Setting up tax areas

Use tax areas to group all of the taxing authorities for a given area, enabling you to select a single tax area rather than multiple taxing authorities when applying taxes to your fees.

You may set up a tax area using only one taxing authority, but you have the flexibility to set up a tax area that combines an unlimited number of taxing authorities, such as provincial sales and service taxes with county sales taxes.

1. Choose Setup > Taxes > Tax Areas.
2. Click the Add button.
3. Enter a unique description for the tax area in the *Description* field.

- Using the drop-down lists in the Taxing Authorities column of the Taxing Authority information grid, choose one or more taxing authorities to combine for the tax area. Note that *Rate*, *Type*, and *GL Account* are read-only fields.



**Note:** You can add, edit, or delete tax areas on the fly by right-clicking in a related field elsewhere in the application and choosing the desired action from the context menu.

## Office setup

If your firm has more than one office, you can create separate office records for each one. You then can assign staff and client records to specific offices, enabling you to filter staff and client data by office.

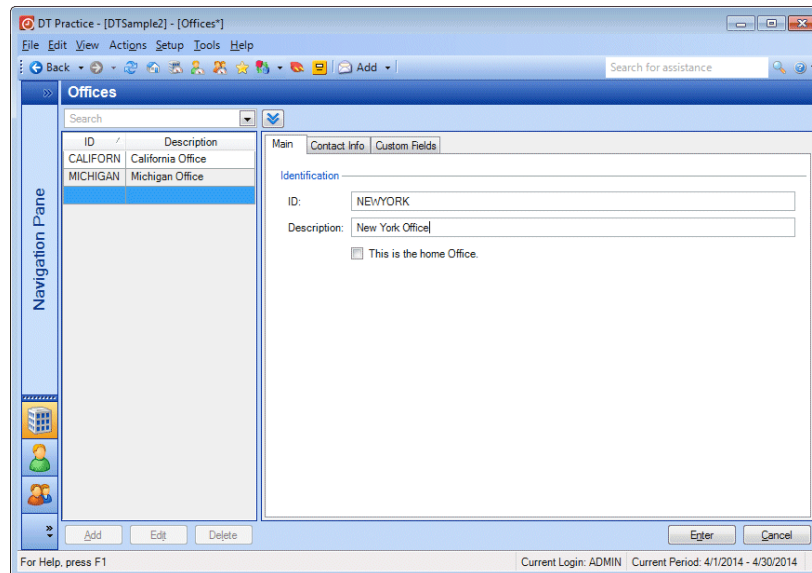
### Setting up custom fields for offices

Before you set up office records for your firm, you first may want to set up custom fields for your offices, as described in “Setting up custom fields” on page 34.

## Setting up offices

Use the Offices setup screen to designate a home office and to enter information for your firm's additional offices.

1. To open the Offices setup screen, choose Setup > Offices.
2. Click Add to add another office, or Edit to edit an existing office record.
3. In the Main tab, enter an ID and description for the office. If this office is to be the firm's home office, mark the *This is the home Office* checkbox.



4. In the Contact Info tab, add the contact information for the office.

You can also use the Contact Info tab to assign contacts to contact categories. For more information on contact categories and setting them up in DT Practice, see "Setting up groupings" on page 48.

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### Notes

- If your firm has a single office, you can enter and update the Home Office information in the Contact Info tab of the Firm setup screen. Information you enter there will also update the Home Office information in the Offices setup screen.
- If your firm has multiple offices, the information for the office you designate as the Home Office in the Offices setup screen (Setup > Offices) appears in the Contact Info tab of the Firm setup screen. You can add additional offices in the Offices setup screen.

- 
5. In the Custom Fields tab, enter information in any fields that appear.

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**Note:** You can add custom fields for this and other screens by choosing Setup > Custom Fields, then the name of the screen where you want the custom fields to appear. For more information, see “Setting up links” on page 33.

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## Staff setup

Before you set up individual staff records, you should set up other information that you will use during staff setup, such as staff department and staff level groupings, staff rate descriptions, security groups (if your firm will use the security features in DT Practice), and custom fields.

If your firm is licensed for the add-on Staff Management module, you will also want to set up staff skill areas and skill ratings.

Staff levels are descriptive labels for staff, such as partner, manager, and associate. You should set up the staff level groupings to mirror your firm's structure.

Groupings such as these are useful for filtering lists and creating reports. For example, by associating each employee with a specific department, you can run a monthly report for all staff in a department, or a report for all staff broken down by department. Similarly, by assigning each employee to a staff level, you can generate reports with data grouped by partners, managers, associates, or any other titles used by your firm.

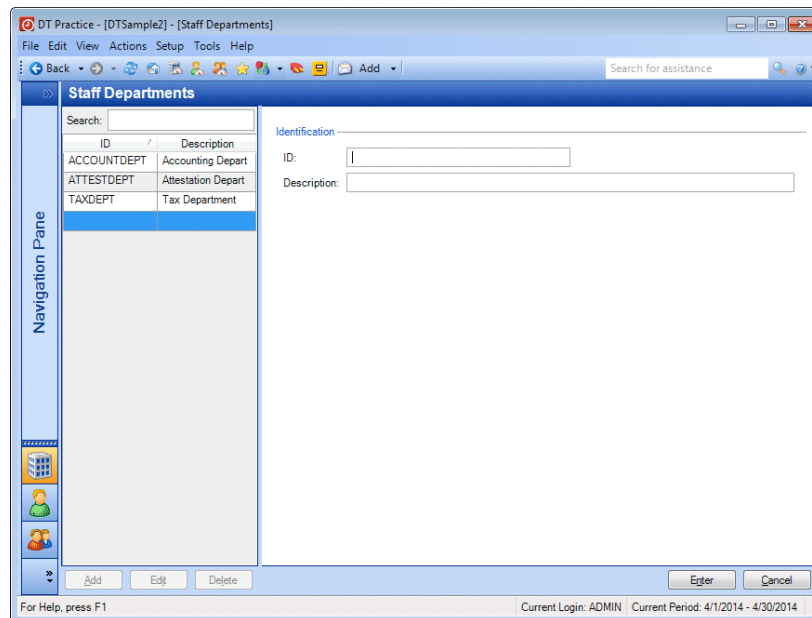
## Setting up groupings

For the example below, we will create a staff department grouping, but the process for creating other groupings in other core areas of the application is the same. Other groupings include staff levels, activity categories, client entities, client engagement categories, and contact categories.

Once you set up groupings, you can select them on the setup screens to which they pertain.

To create a staff department grouping, follow these steps.

1. From the Setup menu, choose Groupings > Staff > Departments.
2. In the Staff Departments screen, click the Add button.



3. Enter a name for the grouping in the *ID* field.
4. Enter a description for the grouping in the *Description* field.
5. Click the Enter button to save the new department, which is now available for selection in the Staff setup screen.



## Setting up staff skill areas and skill ratings

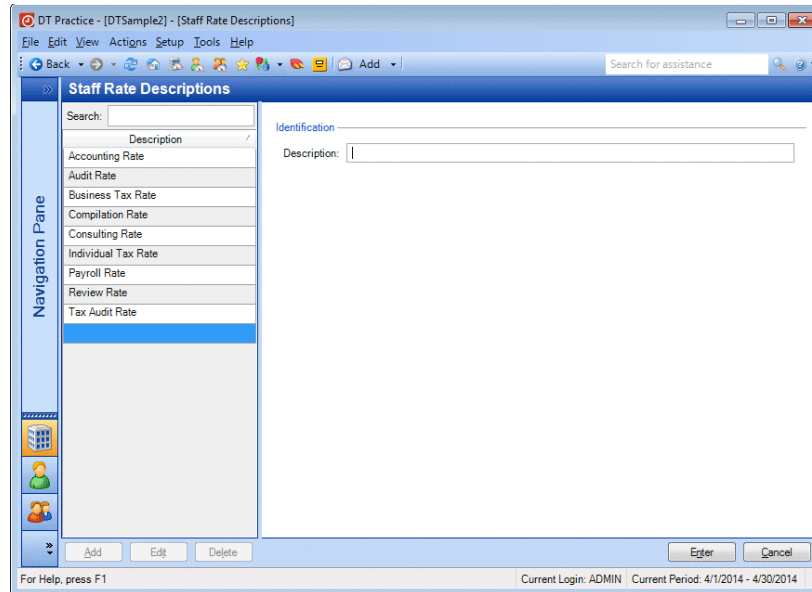
If your firm is licensed for the add-on Staff Management module, you should also set up skill areas and skill ratings for your staff. Choose Setup > Staff Skill Areas to set up skill areas, which represent the types of work done by your staff. Choose Setup > Staff Skill Ratings to set up skill ratings, which establish a scale of competency (sample ratings might be novice, average, expert, and so on). You will use skill areas and skill ratings later during staff setup when you create skill sets for each staff member.

## Setting up staff rate descriptions

Staff rate descriptions provide a way for your firm to distinguish between various billing rates. For example, if your firm bills for audit, consulting, and tax services at different rates, you can add separate rate descriptions for them. These descriptions are then available in the Rates tab of the Staff setup screen, where you can set up hourly rates for each employee to match your firm's rate descriptions. These rates can then be applied to your clients' engagements (Setup > Clients > Engagements tab) and/or activities (Setup > Activities > Main tab), and they appear during time entry.

You can set up an unlimited number of staff rate descriptions.

1. Choose Setup > Staff Rate Descriptions.



2. Click the Add button to enter a new record.
3. Enter a description of the rate in the *Description* field, such as "Discount Rate" or "Premium Rate."
4. Click the Enter button to save the record.

## Setting up security groups

If your firm decides to use the security features in DT Practice, your firm administrator can use the Security Groups screen to set up application security for the firm. Using security groups, the firm administrator can assign staff various levels of security permissions for application access, protect the product's features, and secure your firm's database.

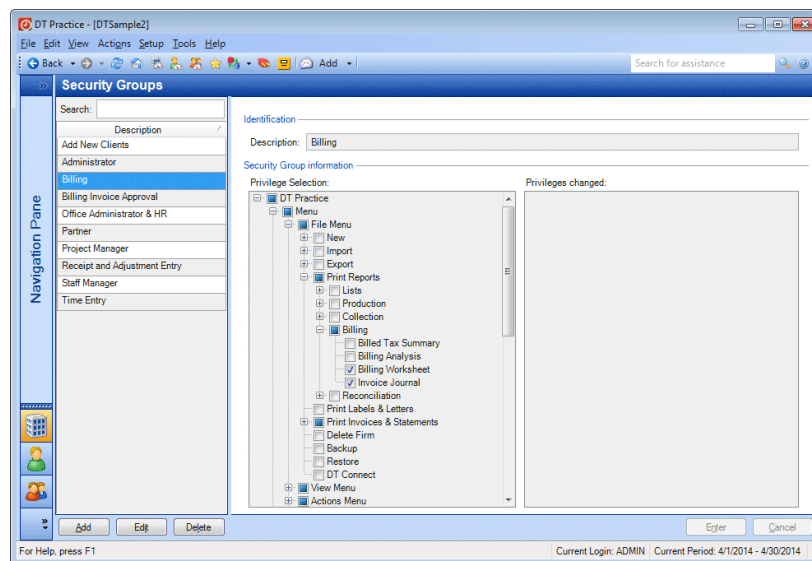
Once you have established security groups for your firm, you can assign each staff member to one or more groups via the Security tab in the Staff setup screen. For more information, refer to the Staff screen > Security tab step beginning on page 56.

**Note:** Before you can set up security groups, you need to enable firm security. See “Enabling firm security” on page 39. You must then exit the application and log in again using the **ADMIN** account.

To create, modify, or delete a security group, follow these steps.

1. From the Setup menu, choose Security Groups.

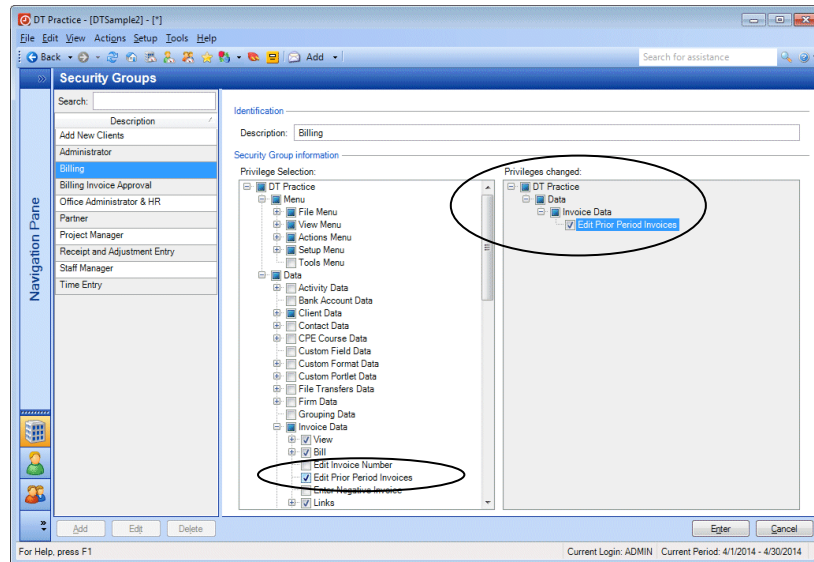
In the Security Groups screen, the selection list shows the descriptions of security groups that have already been set up. In this screen you can create, modify, and delete security groups, and review permissions assigned to security groups.



2. To create a security group, click the Add button and enter a name in the *Description* field. In the Privilege Selection tree, click the **+** button to expand the list, and mark the checkboxes next to the permissions you want to assign to the security group.
3. To edit a security group, click the description in the Security Groups selection list, click the Edit button, and mark the checkboxes next to the permissions you want to add or remove from the group.

Each time you make a change in the Privilege Selection pane, the results of that change are displayed in the Privileges changed pane. For example, if you change the Billing security group by marking the

Edit Prior Period Invoices checkbox, the Privileges changed pane shows you which areas of the application are affected by that change.



**Note:** The Privileges changed pane only shows the results of your most recent change.

For more information about the relationship among security privileges, see the topic [More about security privileges](#) in the DT Practice Help & How-To Center.

4. Click the Delete button to delete a selected security group. Note that you cannot change or delete the Administrator security group. The Administrator group has all security privileges. All firms must assign at least one staff member to the Administrator group to ensure that all areas of the application can be accessed.
5. When finished, click the Enter button.
6. Choose File > Close Firm to log out of DT Practice as staff ADMIN.

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**Note:** If a staff member belongs to multiple security groups that have different settings for a security privilege, the staff member will be granted the privilege. For example, if one assigned group allows a staff member Add privileges for Access Other Staff and the other group does not allow that privilege, the staff member will be granted Add privileges.

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## Setting up custom fields for staff

The process for creating custom fields for staff records is similar to that for creating custom fields for office records. See “Setting up custom fields” on page 34.

## Setting up staff records

Use the Staff setup screen to enter employee data such as personal address and contact information and staff billing rates. For this example, we will use the Sample database to set up a staff member.

1. Choose File > Open Firm to log back in to DT Practice.
2. On the login screen, enter **CAT** in the *Staff ID* field.
3. Leave the *Password* field blank.
4. Click OK.
5. Because this is the first time you have logged in as CAT since you enabled security, you will be prompted to set up a password. Enter **password** in the *New Password* and *Confirm New Password* fields, and click OK.

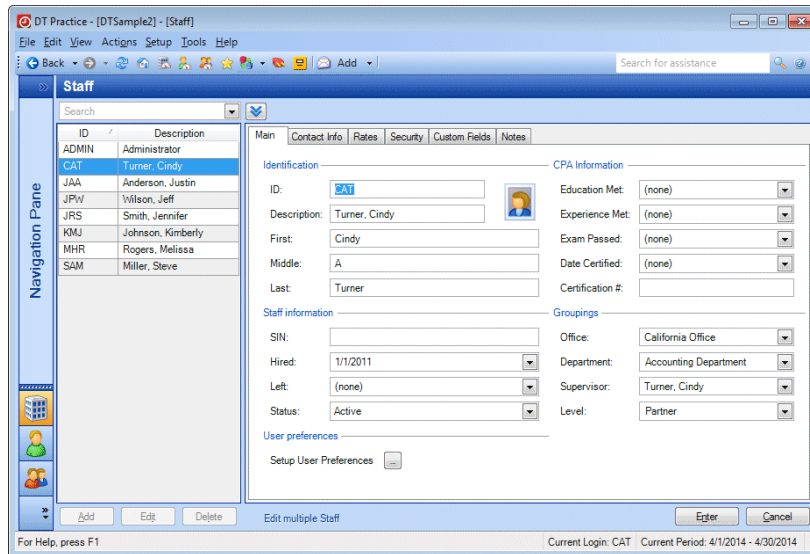


The image shows a 'Change Password' dialog box. The title bar reads 'Change Password'. The main text says: 'This is the first time you have logged on to Practice CS or your password has been reset. Please enter a password for future logons.' There are two input fields: 'New Password:' and 'Confirm New Password:'. Both fields contain a series of dots representing masked characters. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

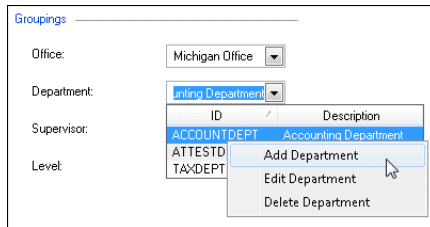
6. From the Setup menu, choose Staff.
7. Click the Add button to add a new employee record, or Edit to make changes to an existing record.

8. On the Main tab, record information for the employee such as staff name, date hired or left, and educational requirements.

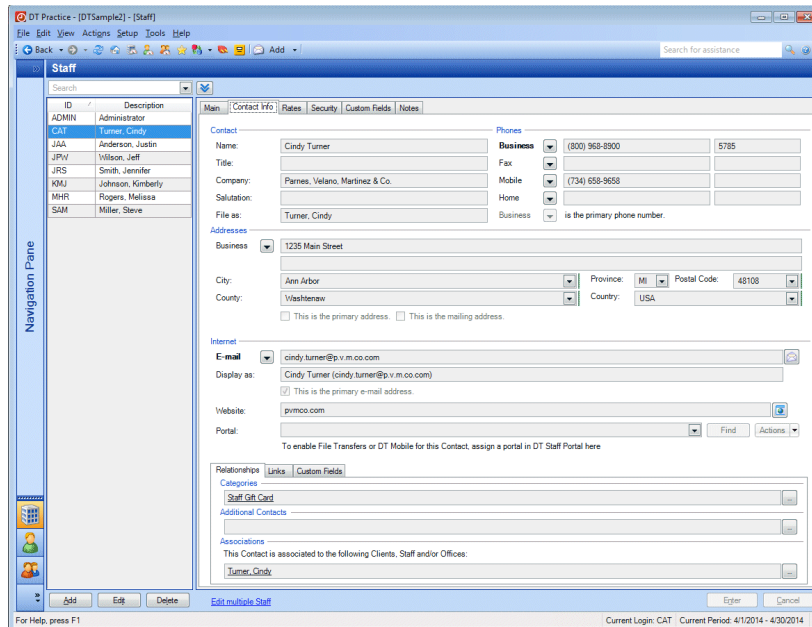
You can also assign the employee to groupings, which are useful for filtering the staff list and for creating reports to analyze staff activities. To learn more about groupings and setting them up in DT Practice, see “Setting up groupings” on page 48.



**Note:** If you have security permission, you can open any of the Groupings drop-down lists and right-click to add, edit, or delete an item “on the fly.”



9. Use the Contact Info tab to record a staff member's name, address, phone, fax, and email information.

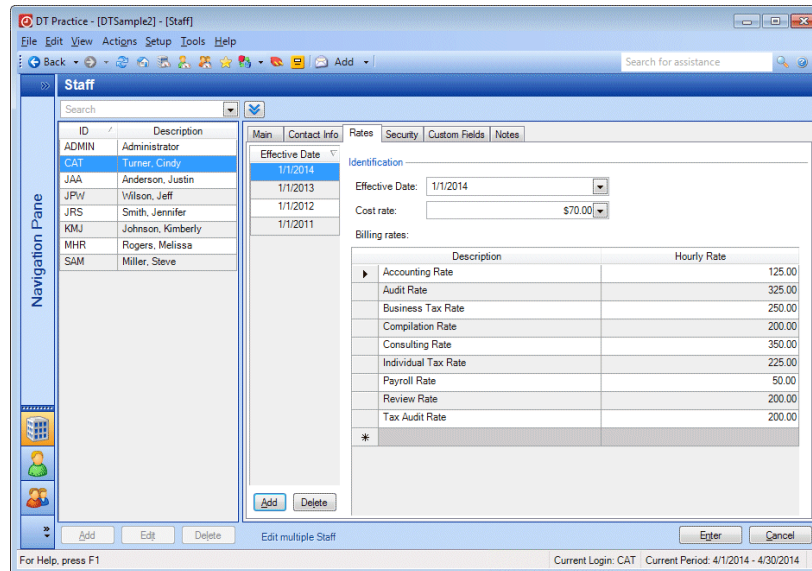


You can also use this tab to assign employees to contact categories, which enable you to sort contacts according to groupings that you define. The contact categories you create can be used with all of your contacts, whether they are your own staff or external contacts such as clients. For more information on contact categories and

setting them up in DT Practice, see “Setting up groupings” on page 48.

10. Use the Rates tab to specify the employee’s cost rate and billing rates.

The Rates tab displays rate descriptions you entered in the Rate Descriptions setup screen. For more information on entering rate descriptions in DT Practice, see “Setting up staff rate descriptions” on page 49.

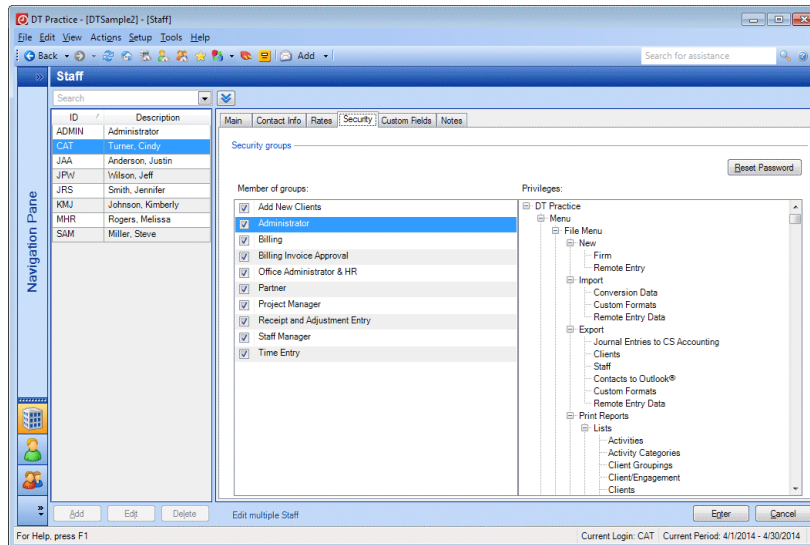


**Note:** Each rate table has an effective date. When you select an effective date from the list on the left, this tab shows the cost and billing rates for that effective date.

11. Use the Security tab to assign an employee to one or more security groups. The Privileges tree on the right shows all areas of the application to which each security group has access. To add a staff member to a security group, mark the checkbox for that group.



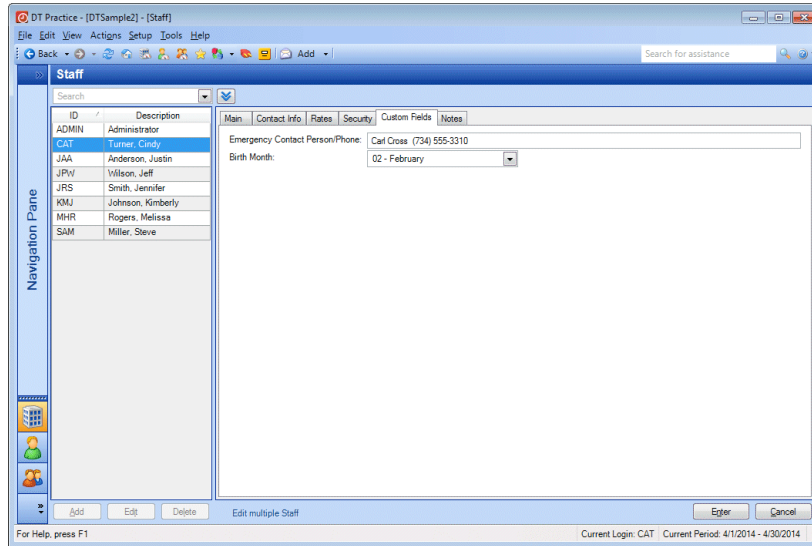
The Security tab displays security profiles you entered in the Security Groups setup screen. For more information on setting up security groups in DT Practice, see “Setting up security groups” on page 50.



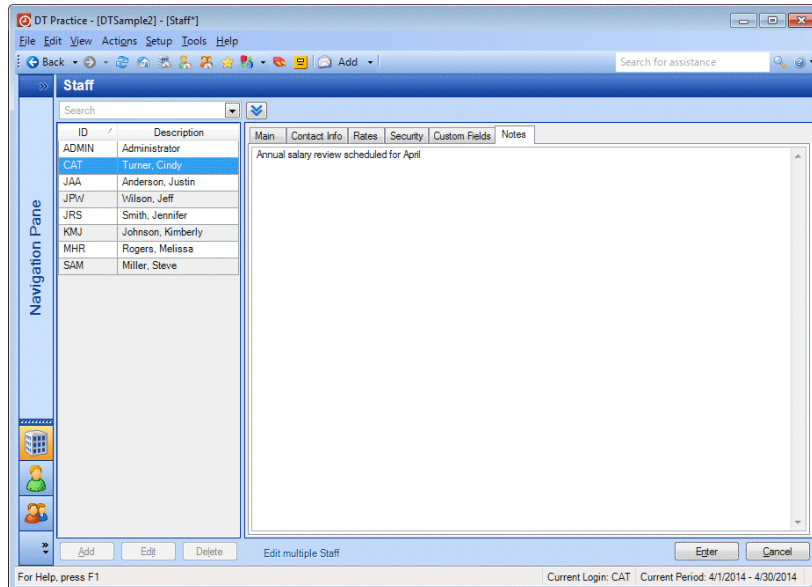
### Notes

- There is no limit to the number of groups a staff member can belong to.
- If firm security is enabled and staff members do not have any security groups selected, they will not be able to log in to the program.
- If a staff member belongs to multiple security groups that have different settings for a security privilege (for example, one security group has add / edit / delete permission and the other group does not), the staff member will be granted the privilege.

12. On the Custom Fields tab, enter applicable information for any available fields.



13. In the Notes tab, enter any information you would like to track about a staff member.



## Setting up staff management tools

The separately licensed Staff Management module enables you to assess staff performance relative to targets set for them, to facilitate staff work assignments by defining qualifications and adding items to work queues, and to track benefits such as comp time, and more. To take advantage of these features, you should perform some initial setup tasks.


### Setting up staff skill sets

Skill sets are comprised of skill areas, which are categories of work that your firm performs, and skill ratings, which denote the level of a staff member's expertise. For example, a staff member may be highly skilled at preparing individual tax returns. You could assign that staff member a rating of "expert" for an "AUDIT" skill area.

Define skill areas by choosing Setup > Staff Skill Areas, and define skill ratings by choosing Setup > Staff Skill Ratings. Once skill areas and skill ratings are defined, you can create skill sets for each staff member on the Staff setup screen (choose Setup > Staff > Skill Set tab).

### Setting up qualifications filters

With staff skill sets established, you will want to set up staff qualifications filters that can be applied to your firm's work. For example, if your firm is also licensed for the Project Management module and you want to restrict the assignment of certain projects to staff with high levels of expertise in a skill area, you can create a filter for such staff and attach it to the relevant projects.

To set up a filter and apply it to a project, choose Setup > Manage Projects, double-click a project to open the Project dialog, and click the  button next to the *Staff qualifications* field in the Assigned section to open the Staff Filters dialog. Click the Add button and define a filter for the desired skill sets. When the filter is complete, click Enter, click Done, and choose the filter in the *Staff qualifications* field.

You can then either assign the project to a qualified staff member, or add it to the firm's work queue, where a qualified staff member can select it.

You can also set qualifications for project and task templates, so that new projects and tasks have qualifications defined by default.

For more information on setting up filters, see "Filtering your data" on page 93.

### Setting staff target hours

To set target hours for a staff member, choose Setup > Staff > Targets tab. On this tab you can define targets for different times of year, entering target work hours for each day of the week and specifying a percentage of hours that should be billable. DT Practice calculates the weekly work hours and billable hours. Choose a billing rate for each time period to have DT Practice calculate a target billable amount.

With target hours entered for your staff, you can monitor staff performance using the Targets tab of the Manage Staff screen.

### Setting up staff benefits

To track staff benefits using the Staff Management module, you need to perform the following setup tasks:

- Specify the current benefit year and enter firm holidays on the Firm setup screen. Choose Setup > Firm > Benefits tab.
- Enable comp time, if applicable, by marking the checkbox on the Benefits tab of the Firm setup screen.
- Add activities with a class of Administrative and an administrative type of Accruable Benefit, then set up accrual rates and carryovers. Choose Setup > Activities. For more information on setting up activities, see “Activity setup” on page 65.
- Activate accruable benefits and comp time for staff and enter effective dates and beginning balances, as applicable.
- If your firm uses the security features in DT Practice, allow access to schedule items. Choose Setup > Security Groups, and for the applicable security groups, mark the checkbox for *Schedule Items* under Setup Menu. This enables your staff to view schedule information and submit benefits requests, such as vacation requests.

For more information on setting up security, see “Setting up security groups” on page 50.

### Editing multiple staff records

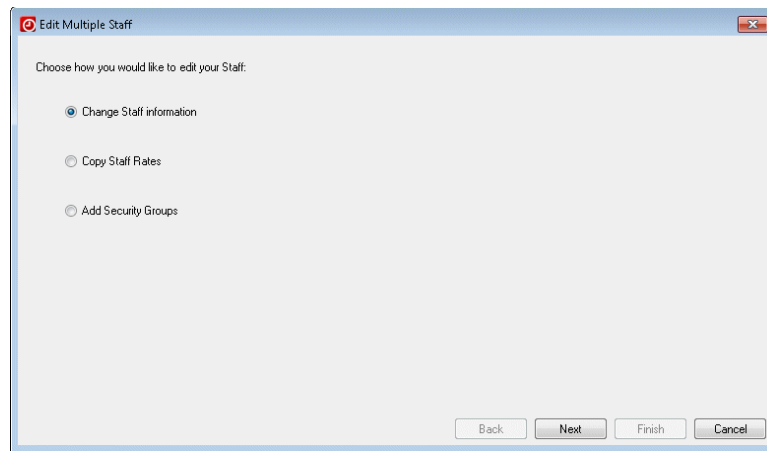
The Edit Multiple Staff dialog provides a quick way to edit information for multiple staff members at one time, or to copy staff billing rates from one staff member to one or more others.

- ▶ To open the Edit Multiple Staff dialog, click the **Edit multiple Staff** link at the bottom of the Staff setup screen.

### Editing information for multiple staff members

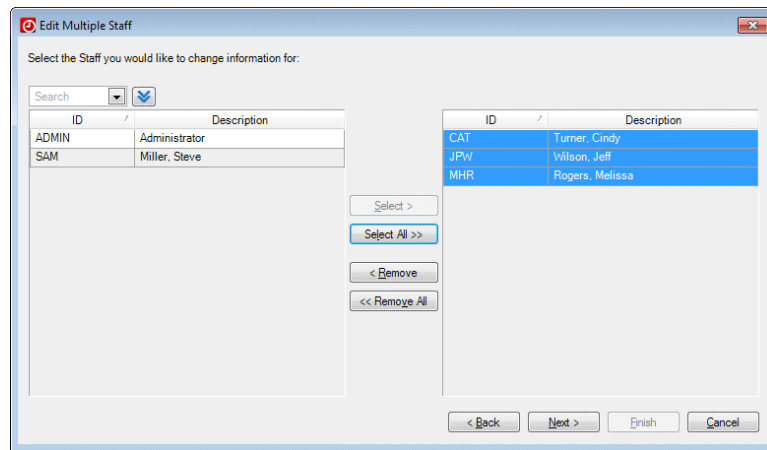
To change information for multiple staff members simultaneously, follow these steps.

1. In the Edit Multiple Staff dialog, click the *Change Staff information* option and click Next.



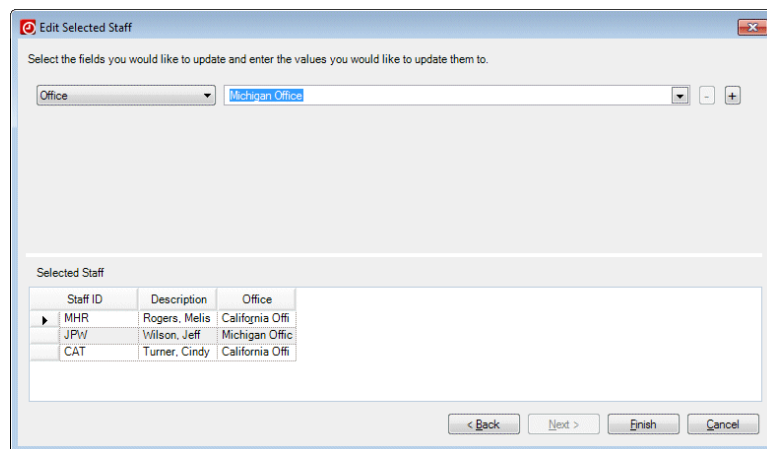
**Note:** If your firm is licensed for Staff Management, this dialog includes *Change Staff Benefits*, *Copy Staff Targets*, and *Add Staff Skills* as additional options.


2. In the left pane, select the staff members whose records you want to change and click the Select button to move them to the right pane. When finished with your selections, click Next.

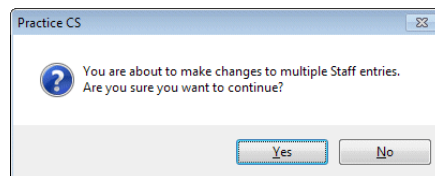


**Note:** To select multiple staff, hold down the CTRL key as you make your selections.

3. In the first field, select the field that you want to change for the selected staff members.
4. In the next field, enter or select the new value for the field.



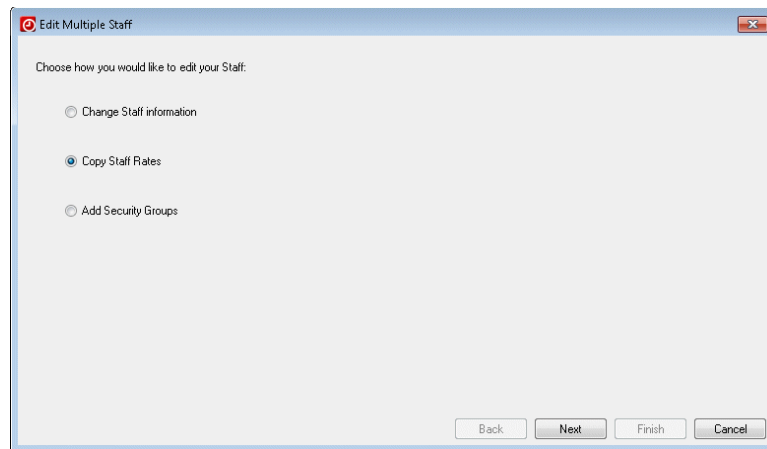
5. If you want to change additional fields, click the  button and repeat steps 3 and 4 above.
6. When finished selecting fields and new values, click Finish.
7. Click Yes to confirm the changes.



### Copying staff billing rates

The following procedure enables you to copy the billing rates used for one staff member to the records of one or more other staff members.

1. In the Edit Multiple Staff dialog, click the *Copy Staff Rates* option and click Next.



2. In the left pane, select the staff members to copy staff rates to and click the Select button to move them to the right pane. When finished with your selections, click Next.

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**Note:** To select multiple staff, hold down the CTRL key as you make your selections.

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3. In the first field, select the staff member whose rates you want to copy to the other staff members' records.
4. In the second field, select the effective date for the set of rates you want to copy. For example, if you want to copy the rates from when the staff member was hired, select the hire date or earliest date. You can verify the rates to be copied in the grid below the fields.

Description	Rate
Accounting Rate	125.00
Audit Rate	325.00
Business Tax Rate	250.00
Compilation Rate	200.00
Consulting Rate	350.00
Individual Tax Rate	225.00
Payroll Rate	50.00
Review Rate	200.00
Tax Audit Rate	200.00

5. Click Finish.
6. Click Yes to confirm the changes.

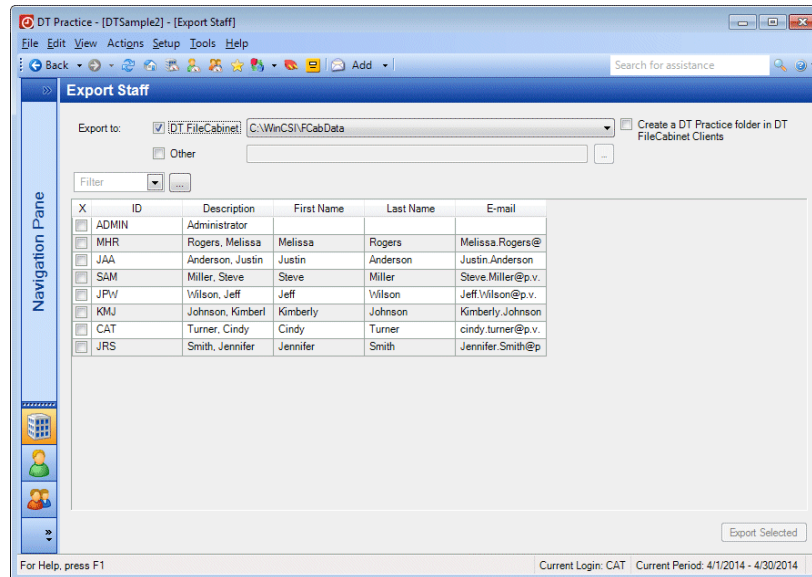
### Exporting staff records to DT FileCabinet

If your firm is licensed for DT FileCabinet, you can export staff from DT Practice to DT FileCabinet. This process creates a drawer for each exported staff member in DT FileCabinet, eliminating the need to set up drawers manually. You can also choose to create a DT Practice folder for each new drawer.

1. Choose File > Export > Staff.
2. On the Export Staff screen, mark the *DT FileCabinet* checkbox.



3. If you want to create a DT Practice folder in each new staff drawer, mark the *Create a DT Practice folder in DT FileCabinet Clients* checkbox.



4. Select the staff you want to export by marking the checkboxes for each. You can filter the staff list to narrow your selection.
5. When your selections are complete, click the Export Selected button. DT Practice exports the selected staff members to DT FileCabinet and creates drawers for each of them.

**Note:** To export staff to an XML file, mark the *Other* checkbox, click the  button and navigate to the folder where you want to save the file.

## Activity setup

When your firm performs services for clients, these services can be broken down into various types of activities, for which there may also be associated expenses. In DT Practice, activities represent both the services the firm performs and the associated expenses. When you enter time and expenses in DT Practice, you are required to select an activity

that represents the service or the expenses associated with that service. Because much of the billing and reporting in DT Practice is based on activity codes, it is important that firm partners and administrators plan the structure of their activity codes very carefully.

Before you set up firm activities, you should first set up information that will be used during activity setup, including activity categories and custom fields.

## About activities and engagements

One of the most important decisions you will make while setting up DT Practice is how to structure your activities and engagements in the application to describe the services you provide to your clients. The activities that you set up in DT Practice represent work that your staff performs, but how do you set up that work in a way that makes sense for your firm and that enables you to generate the kinds of reports you will need to see?

DT Practice provides a multiple-tier structure that is flexible enough to accommodate large and small firms, with just a few specialties or a wide range of client services. These tiers consist of activities and activity categories along with engagements and engagement categories.

During time entry, your employees choose a client, engagement, and activity for each transaction. Thoughtful setup of your firm's engagements and activities will increase staff efficiency and maximize the information you can extract from your DT Practice database.

The most general tier of the structure is **engagement categories**. At this level, you may wish to subdivide your firm's services into just a few major areas, such as tax, accounting, and consulting services.

For each engagement category, you can then set up **engagement templates**, which describe general tasks performed for clients. For example, under a "Tax Services" engagement category, you might add engagement templates for Corporate Tax Services and Individual Tax Services. These templates can be used to add engagements to your client records quickly and efficiently. The engagements can then be edited on a client-by-client basis to tailor them to a client's unique circumstances.

Beyond engagements, activities typically provide more detailed descriptions of the work your staff performs. The activities themselves can be grouped by activity categories that you define.

If you have defined a “Tax Services” engagement category and separate engagement templates for “Corporate Tax Services” and “Individual Tax Services,” you can use **activity categories** to create another tier in the engagement/activity structure. For example, you can add activity categories for various corporate tax entities.

The most detailed level of this structure is **activities**. Assuming you set up engagement categories and templates as described above, and created activity categories for the various tax entities, you could then create activity codes for the specific tax-related tasks that your staff performs, such as preparing a return, reviewing a return, and so on.

The structure described in this section is just one way you could set up these items in DT Practice. You may decide that your firm’s processes require a different setup strategy. DT Practice is designed to be flexible enough to accommodate the optimal structure for your firm, whatever you decide it should be. We strongly encourage you to think very carefully about this aspect of application setup, because how you implement your engagement and activity structure will determine how useful the data provided by DT Practice will be for your firm. You should also strive to implement your firm’s optimal structure from the beginning, as it will be difficult to reconfigure that structure after you have begun using DT Practice to process data.

### Setting up activity categories

Use activity categories to create separate classifications, or groupings, of staff activities. These categories are then available for selection in the Main tab of the Activity setup screen. Examples of activity categories might include “Audit work,” “Employee expenses,” “Vacation/sick time,” “Tax return preparation,” or any other appropriate designation.

Bear in mind that within each activity category, you can create an unlimited number of individual activities. For a “Benefits” activity category, therefore, you could create separate activities for “vacation” and “sick,” enabling you to differentiate between the two. Before setting up activity categories, be sure to read “About activities and engagements” beginning on page 66.

Activity categories resemble other groupings in DT Practice, and the process for creating them is also similar. Choose Setup > Groupings > Activity Categories to access the Activity Categories setup screen. For more information on creating groupings, see “Setting up groupings” on page 48.

## Setting up custom fields for activity records

The process for creating custom fields for activity records is similar to that for creating custom fields for other records. See “Setting up custom fields” on page 34.

## Setting up activities

Activities are the most detailed level of staff work tracked by DT Practice. Before you set up activity records, be sure to read “About activities and engagements” beginning on page 66.

To set up an activity in the application, follow these steps.


1. From the Setup menu, choose Activities.
2. In the Activities screen, click the Add button.
3. Enter a unique ID for the activity.
4. Enter a brief description in the *Description* field. This is a description for internal use that will appear on reports.
5. You can enter a longer, more detailed description in the *Invoice Description* field. This is the description that will appear on invoices.
6. In the *Type* field, select either **Time** or **Expense**.
7. In the *Class* field, select **Billable**, **Nonbillable**, or **Administrative** for the activity.

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**Note:** Administrative activities can only be selected for clients designated as Administrative on the Client setup screen.

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- If you selected **Administrative** in the *Class* field, you must then make a selection in the *Administrative type* field — either **Accruable Benefit**, **CPD**, or **General**. This designation is important if your firm is licensed for the Staff Management module.

- If your firm is licensed for Staff Management and you selected **Accruable Benefit** in the *Administrative type* field, click the  button and set up the rate of accrual and carryover information in the Accruable Benefit dialog.

8. In the *Status* field, select **Active**. If an activity is marked Inactive, it is not available for use in time and expense entry.
9. Enter any additional information for the activity in the appropriate fields. Other available setup options include assigning the activity to an activity category grouping for reporting purposes; calculating a surcharge, service tax, or sales tax on the activity; and assigning a staff rate or fixed rate to the activity.
10. On the Custom Fields tab, enter applicable information in any custom fields.

See “Setting up custom fields” on page 34 for more information on creating your own custom fields.

## Client setup

Before you create records for your firm’s clients, you should first set up information that you will use during client setup, including client entities, contact categories, engagement categories, custom fields, recurring bill descriptions, and engagement templates.

### **Setting up client entities**

Client entities might include “CORP,” “EXEMPT,” “INDIV,” or any other designations that describe the various types of clients you serve. Choose Setup > Groupings > Clients > Entities to open the Client Entities setup screen.

### **Setting up contact categories**

Use contact categories to group contacts together according to certain criteria. For example, you may wish to send certain letters only to your tax clients, or send important announcements to contacts for selected clients. The categories you establish can be used for any type of contact within DT Practice, including your firm, staff, and clients.

Contact categories resemble other groupings in DT Practice, and the process for creating them is also similar. Choose Setup > Groupings > Contact Categories to access the Contact Category setup screen. For more information, see “Setting up groupings” on page 48.

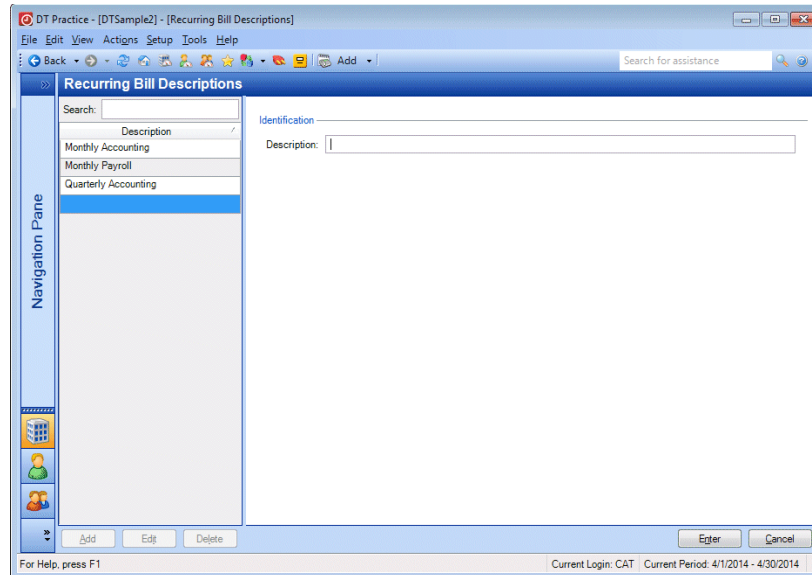
### **Setting up recurring bill descriptions**

Your firm may use many varieties of recurring bills for different clients and engagements. DT Practice enables you to describe these varieties using recurring bill descriptions. You can then select these descriptions when you are setting up an engagement for a client for work that you bill on a recurring basis.

Follow these steps to add a recurring bill description.

1. From the Setup menu, choose Recurring Bill Descriptions.

2. Click the Add button.



3. In the *Description* field, enter a name that describes the type of recurring bill.

---

**Example:** If you have a client for whom you perform monthly write-up work, enter **Monthly Write-up**.

---

4. Click the Enter button to save the description.

## Setting up engagement categories

Engagement categories are high-level groupings describing the work performed by your staff. Before creating engagement categories, be sure to read “About activities and engagements” beginning on page 66.

Engagement categories might include “ADMIN,” “AUDIT,” “BOOKKEEP,” “TAX,” or any other designations that describe the sort of services your firm provides to its clients.

Set up these groupings by choosing Setup > Groupings > Clients > Engagement Categories. For more information, see “Setting up groupings” on page 48.

## Setting up engagement templates

Engagement templates make it easier to set up new engagements for a client, by providing standard templates for engagements that can be copied to a client record and then edited to suit the actual engagement. You can also designate a template as the default engagement for new clients. Every client must have at least one engagement assigned in the application.

**Note:** Items you select from the drop-down lists in this screen come from entries you have made via the Setup menu (for example, Setup > Taxes > Tax Areas). If you have security permission, you can also right-click in any of these drop-down lists to add, edit, or delete items in the list.

The following steps will walk you through the process of creating a new engagement template.

1. From the Setup menu, choose Templates > Engagements.
2. Click the Add button.
3. In the *ID* field, enter an ID for the engagement that will make it easily identifiable for your staff.



---

**Note:** This is a required field. The ID will be saved in upper case letters regardless of how it is entered.

---

4. In the *Description* field, enter a description for the engagement. An example might be “Annual year-end audit.”
5. Because all clients must be assigned at least one engagement in the application, it is necessary to have a default engagement. If you wanted to designate this engagement template as the default for all new clients, you would mark the *Default Engagement for new Clients* checkbox.
6. Make selections in the following fields as appropriate:
  - *Office*
  - *Category*
  - *Biller*
  - *Reviewer*
  - *Manager*
7. On the Rates tab, click a rate option.
  - *No Engagement Rate*: This is the default rate for a new engagement.
  - *Staff Rate*: Select a staff billing rate from the drop-down list. This causes the engagement to be billed by the rate category you select. When employees enter time for the engagement, the rate is drawn from the corresponding entries in their staff records.
  - *Fixed Rate*: Enter a fixed rate amount for the engagement.
8. If this is a recurring engagement, click the Recurring Bills tab and enter a description, method, amount, and other information as necessary.
9. If this engagement involves surcharges, click the Surcharges tab and click the appropriate option. The default option is *No Surcharge*.
10. If you want to link this engagement with a document, folder, web page, interaction, or DT FileCabinet document, click the Links tab and add the link. For information on adding links, see “Setting up links” on page 33.

11. If your firm has added custom fields for engagements, click the Custom Fields tab and enter the information.
12. Click the Enter button to save the engagement template.

The engagement template is now available for selection when setting up a new client.

### **Setting up custom fields for client records**

The process for creating custom fields for client records is similar to that for creating custom fields for other records. See “Setting up custom fields” on page 34.

### **Setting up project management tools**

The separately licensed Project Management module enables you to track the work your firm performs for its clients by breaking it down into projects that represent specific instances of an engagement, and then by individual tasks within those projects. Use projects and tasks for status reporting, project tracking, and streamlining your workflow through features such as notifications. For more information on notifications, see “Setting up notifications” on page 77.

#### **Setting up tracking descriptions**

If you are licensed for the Project Management module, you should set up tracking descriptions to help track the progress of projects within the application. These descriptions may include items such as “Started,” “Not Started,” “Cancelled,” “Completed,” and so on, based on the various stages of projects that you want to be able to track.

To set up tracking descriptions, choose Setup > Tracking Descriptions.

#### **Setting up project and task templates**

If you are licensed for the Project Management module, you will want to set up project templates to simplify the creation of projects in DT Practice. Depending on how your firm handles projects, you may also want to set up various tasks for each project template you create.

You can associate both project and task templates with software solutions you will use to work on them, such as Microsoft Word.®

- ▶ To set up project and task templates, choose Setup > Templates > Projects.

## Setting up project templates

Project templates contain key project information, such as date calculations, recurrence patterns, project tasks, budget information, and assignments. When you add a project to a client record, you select a project template, and project information — including date calculations and future project creation — is filled in from that template.

The screenshot shows the 'DT Practice - [DTSample2] - (Project Templates)' window. On the left is a 'Navigation Pane' with a search bar and a list of templates. The main area is the 'Main' tab, which is divided into several sections:

- Identification:** ID: 709, Description: Gift Tax Return, Invoice description: Preparation of U.S. Gift Tax Return for the year ended [Date Format(Report Date Period End): 'MMMM d, yyyy'].
- Project information:** Engagement: Business Tax Services, Priority: Normal, Tracking: Not Started, Responsible: Client Partner, Department: Tax Department.
- Entities:** Associated Entities: (empty field).
- Budget information:** Base on Tasks:  Calculate amount automatically:  Hours: 0.00, Amount: \$0.00.
- Generation:** Pattern: Due on every April 15, Solution: Other.
- Extensions:** Extend the original due date by: Extension Number: 1, Month(s): 6, Day(s): 0.

Buttons for 'Add', 'Edit', and 'Delete' are at the bottom left, and 'Enter' and 'Cancel' are at the bottom right.

Use the *Associated Entities* field to specify the entity types for which this project should always be created. When you add one of those entities to a client record, you will be prompted to add the associated project(s) as well.

## Project generation

On the Main tab, you can specify when the next project should be generated for a client, and choose information from the current project upon which to base the next generated project. If you want to generate future projects so that they are available before the current one is completed, choose a date prior to the due date. You can also have projects generated automatically at a fixed period of time before they will be due by entering the number of months and/or days that will provide you with the desired project generation date. This option can help simplify your project planning by showing you only the projects that are

currently relevant. You can also choose to manually create new projects. For more information on the available project generation options, please see the topic [Setting up project recurrence and generation options](#).

If you anticipate needing extensions for a type of project, those extensions should be set up at the template level. Click the Dates tab and add one or more extensions by specifying the number of months and days by which to extend the due date.

### Importing default project templates

To assist you with setup, DT Practice comes with more than 400 common default project templates that you can import and use to set up your own projects. Click the **Import Default Project Templates** link at the bottom of the screen to open the Import Default Project Templates screen. Here you can import all of the default templates, or select the ones that are most relevant to your firm.

X	ID	Description	Recurs	Due Date	Imported
<input type="checkbox"/>	990FED	Annual Info Rtn for Exmpt Orgs	Annually	Due on every fifth month after FYE on day 15	No
<input type="checkbox"/>	1040A	U S Ind. Income Tx Rtn (1040A)	Annually	Due on every April 15	No
<input type="checkbox"/>	1040ES	Fed Ind. Est. Tax	Periodic	April 15, June 15, September 15, January 15	No
<input type="checkbox"/>	1040EZ	U S Ind. Income Tx Rtn 1040EZ	Annually	Due on every April 15	No
<input type="checkbox"/>	1040FED	U S Ind. Income Tax Return	Annually	Due on every April 15	No
<input type="checkbox"/>	1041FED	U S Income Tx Rtn - Est & Trsts	Annually	Due on every fourth month after FYE on day 15	No
<input type="checkbox"/>	1065FED	U S Part. Return of Income	Annually	Due on every fourth month after FYE on day 15	No
<input type="checkbox"/>	1120A	U S Corp. Sht-Firm Income Tx Rtn	Annually	Due on every third month after FYE on day 15	No
<input type="checkbox"/>	1120C	U S Corporation Income Tx Rtn	Annually	Due on every third month after FYE on day 15	No
<input type="checkbox"/>	1120L	U S Life Insurance Corp Return	Annually	Due on every third month after FYE on day 15	No
<input type="checkbox"/>	1120PC	Prop & Casualty Ins Co Fed Rtn	Annually	Due on every third month after FYE on day 15	No
<input type="checkbox"/>	1120REIT	Real Estate Invstmnt Trust Rtn	Annually	Due on every third month after FYE on day 15	No
<input type="checkbox"/>	1120RIC	Reg Investment Company Return	Annually	Due on every third month after FYE on day 15	No
<input type="checkbox"/>	1120S	U S Income Tx Rtn for S Corp	Annually	Due on every third month after FYE on day 15	No
<input type="checkbox"/>	2688FED	Ind. Additional Ext Request	Annually	Due on every August 15	No
<input type="checkbox"/>	4868FED	Ind. Extension Request	Annually	Due on every April 15	No
<input type="checkbox"/>	7004FED	Corp. Extension Request	Annually	Due on every third month after FYE on day 15	No
<input type="checkbox"/>	8109	U S Corporation Estimated Tax	Periodic	April 15, June 15, September 15, December 15 after FYE	No
<input type="checkbox"/>	8736FED	1065, REMIC & 1041 Ext Request	Annually	Due on every April 15	No
<input type="checkbox"/>	8800FED	1065 REMIC & 1041 Add Ext Rqst	Annually	Due on every July 15	No
<input type="checkbox"/>	90221	Foreign Bank Account	Annually	Due on every sixth month after FYE on day 30	No
<input type="checkbox"/>	AK04611	AK Corp. Income Tax	Annually	Due on every fourth month after FYE on day 15	No

## Setting up task templates

Task templates provide a way of breaking down projects into individual components, or tasks. Though tasks can help any firm track project status, they are especially useful if your firm divides projects among multiple employees. Task templates contain key information for individual tasks that make up the project. Click the Tasks tab to add new tasks.

If you use tasks, you can mark the *Base on Tasks* checkbox on the Main tab of the Project Templates setup screen to base a project's budget information on the information entered for its tasks, or leave the checkbox unmarked and enter your own project-level budget information.

You can also use links and custom fields for tasks.

For more information on project or task templates, choose Help > Help & How-To, and enter **project templates** or **task templates** in the search field for a list of relevant topics. You may also want to open the Sample database and look at the projects that have been set up there.

## Setting up notifications

When certain changes are made to a project or task, DT Practice can provide notifications about those changes to relevant staff members, via dashboard portlets and/or pop-up notifications. To set up notifications for

your firm, choose Firm from the Setup menu and then click the Notifications tab.

**Note:** If your firm has enabled security profiles in DT Practice, you must have security privileges to make changes to the Notifications tab.

In the Notifications tab, mark checkboxes for each monitored event that should trigger notifications, and indicate which staff members should receive those notifications. You can choose the Responsible and Assigned staff and choose an additional staff member from a staff list.

Main   Contact Info   Preferences   Billing and A/R   Benefits   Notifications					
<b>Client</b>					
Monitored Event	Notify	Partner	Manager	Notify by E-mail	
<input checked="" type="checkbox"/> The A/R Limit was exceeded	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> The WIP Limit was exceeded	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Project Management</b>					
Monitored Event	Notify	Responsible	Assigned	Notify by E-mail	
<input type="checkbox"/> The Assigned on a Project changed	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The due date on a Project changed	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The received date on a Project was entered	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> A Project was extended	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> A Project Task Staff changed	<input type="text"/>	Staff		<input type="checkbox"/>	
<input checked="" type="checkbox"/> Notify the Staff assigned to a Task that it is ready to be worked on	<input type="text"/>			<input type="checkbox"/>	
<b>Client Management</b>					
Monitored Event	Notify	Partner	Manager	Notify by E-mail	
<input checked="" type="checkbox"/> Notify Staff when a Phone Message is taken for them	<input type="text"/>			<input type="checkbox"/>	
<input type="checkbox"/> Notify Staff when a new Portal is registered	<input type="text"/>			<input type="checkbox"/>	
<input type="checkbox"/> Notify Staff when a File Transfer is completed	<input type="text"/>			<input type="checkbox"/>	
<input type="checkbox"/> Notify Staff when files provided by a Contact are ready to download	<input type="text"/>			<input type="checkbox"/>	
<input checked="" type="checkbox"/> Notify Staff when a file in a File Transfer is electronically signed or rejected	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Notify Staff when a file in a File Transfer is downloaded	<input type="text"/>			<input type="checkbox"/>	
<b>Staff Management</b>					
Monitored Event	Notify	Supervisor	Assigned	Notify by E-mail	
<input type="checkbox"/> Benefit time was lost due to the carryover maximum	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/> Benefit time was used	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/> Comp time earned was entered	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	
<input checked="" type="checkbox"/> A Scheduled Benefit request was entered	<input type="text"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
<input checked="" type="checkbox"/> Status changed on a Scheduled Benefit	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The Target Start Date on a Schedule Item changed	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The Target Complete Date on a Schedule Item changed	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> A Schedule Item has been completed	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	

To aid your firm's workflow, mark the *Notify the Staff assigned to a Task that it is ready to be worked on* checkbox. Each time a project task is

completed, the staff member assigned to the subsequent task is notified that the task is ready to be worked on. You can also mark the *Notify by E-mail* checkbox to send the appropriate staff member a message about monitored events.

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### **Notes**

- Individual staff members can enable desktop notifications by choosing Setup > User Preferences and marking the *Enable desktop notifications for monitored events* checkbox on the System tab.
  - If your firm is licensed for the Staff Management module, the monitored events in the Staff Management section are available.
- 

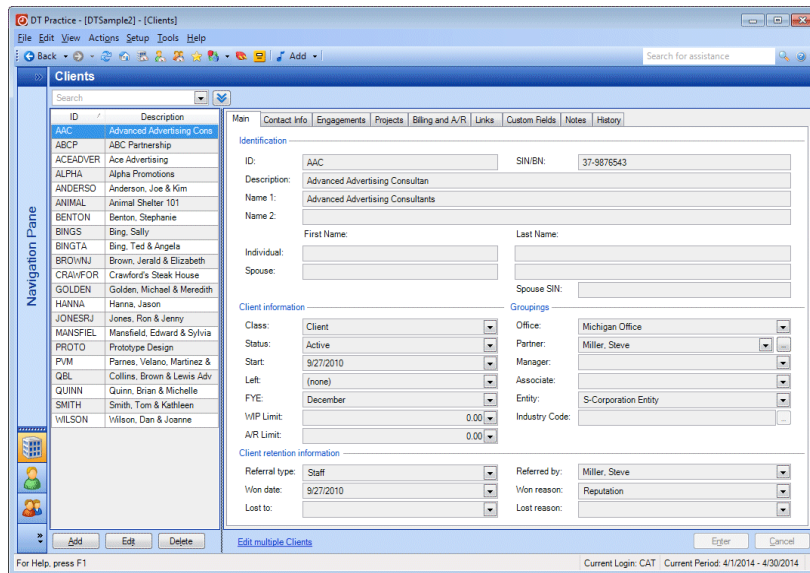
## **Setting up client records**

DT Practice enables you to enter all the information your firm needs to track and bill the services you perform for your clients. In the Clients setup screen you can enter client identification information, manage contact information, specify billing options, set up engagements for the client, and, if licensed for the Project Management module, manage projects for the client. You can also select client groupings for use in reporting and analysis.

To set up client information, follow these steps.

1. From the Setup menu, choose Clients.
2. Click the Add button.
3. On the Main tab, you can enter the following client information:
  - Name, ID, and tax information
  - Client status (active or inactive)
  - Dates such as when you began performing services for the client and the client's fiscal year end date
  - WIP limit and A/R limit

You can also assign the client to groupings, which are useful for filtering the client list and for creating reports to analyze performance and efficiency of the services provided for the client. To learn more about groupings and setting them up in DT Practice, see “Setting up groupings” on page 48.



**Note:** The Client retention information section of the Main tab is available only if you are licensed for the Client Management add-on module. This module enables you to track information on how and why your firm attracts or loses clients, using retention descriptions that you set up. For more information, see the topic [Setting up client retention descriptions](#).



- Use the Contact Info tab to set up the client's main contact information. You can set up additional contacts (for example, the client's employees) with whom you need to communicate to provide services for the client. You can also set up associations to link other contacts to your clients. For example, you can link this client with the attorney that they use.


On this tab, you can also designate contacts as the primary, preferred, and billing contacts for the client.

The **primary contact** is the main entry for the client, and may be either a company or a person.

The **preferred contact** is the person who represents the client in its relationship with your firm. By default, the primary contact is also designated as the preferred contact, but you can designate any contact (including internal staff or office contacts) as the preferred contact for a client.

The **billing contact** is the person to whom billing communications for the client (such as invoices) are addressed. By default, the primary contact is also designated as the billing contact, but you can designate any contact (including internal staff or office contacts) as the billing contact for a client.

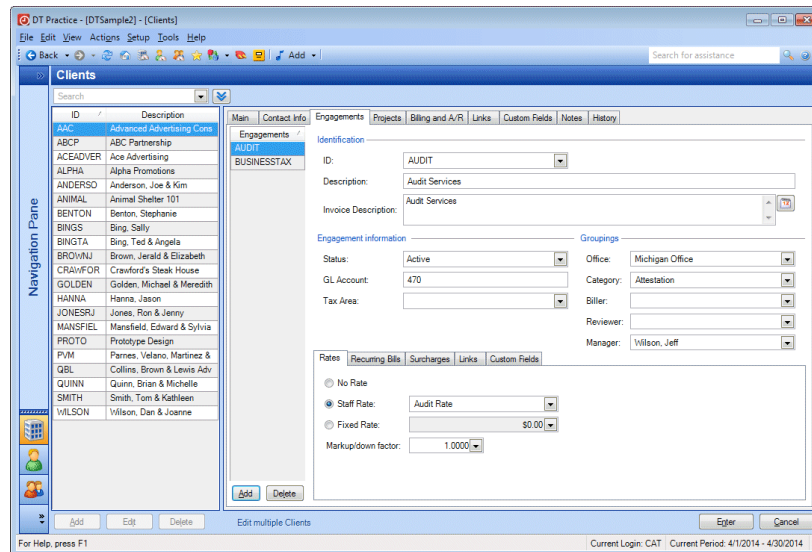
You can also add **additional contacts**, who can be other employees of the client or other contacts associated with the client (such as an attorney).

On the Contact Info tab you can also assign contacts to contact categories, which enable you to sort contacts according to groupings that you define. The contact categories you create can be used with all of your contacts, whether they are your own staff or external contacts such as clients. Click the  button next to the *Categories* field and select from existing categories.

5. On the Engagements tab, you can assign an unlimited number of engagements to a client. To add an engagement to a client, click the Edit button at the bottom of the Clients screen (if necessary). Then click the Add button at the bottom of the Engagements tab and select an engagement from the drop-down list in the *ID* field.

Engagements available in the drop-down list are set up in the Engagement Templates screen (Setup > Engagement Templates). For details, see “Setting up engagement templates” on page 72.

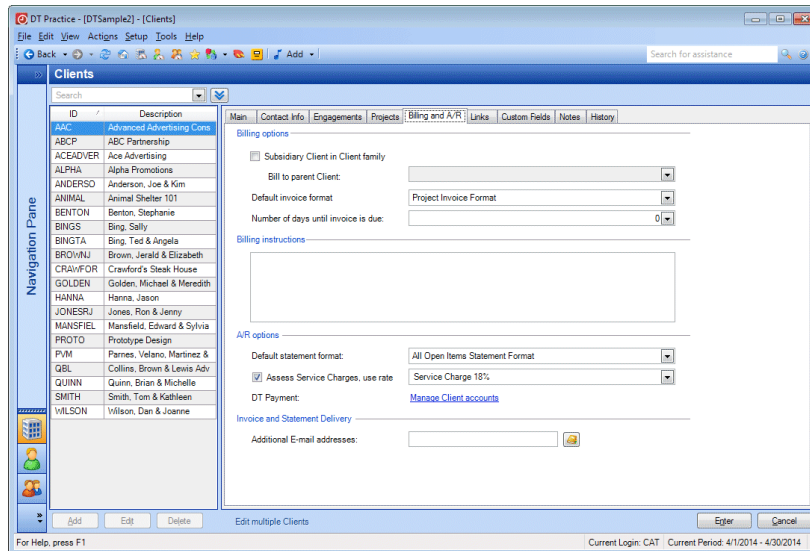
You can add this client's engagements to groupings for filtering and reporting purposes. In addition, you can enter an engagement rate and / or markup factor; set up the engagement as a recurring bill (such as a monthly write-up); and apply a surcharge to the engagement.



6. On the Projects tab, you can manage project items for the client (if your firm is licensed for the Project Management module). For more information on the Project Management module, choose Help > Help & How-To, enter **projects** in the search field, and click any of the entries that appear in the search results.
7. On the Billing and A/R tab you can indicate whether the client is part of a client family that should be billed to another client, select default invoice and statement formats, and specify the number of days until an invoice is due.

**Note:** The number of days until invoices are due is set at the firm level, but you can override the days to due date here on a per-client basis.

You can set up the client to be assessed service charges at a rate you determine, and also enter internal billing instructions for the client that will appear during billing.



For more information on setting up the service charge rate you choose on this tab, see “Setting up service charges” on page 32.

8. On the Links tab, add any applicable links to files, folders, web pages, DT Practice interactions, or DT FileCabinet documents.

**Note:** Adding links to interactions is available only if you are licensed for the Client Management module.

For more information on links, see “Setting up links” on page 33.

9. On the Custom Fields tab, enter applicable information in any custom fields.

See “Setting up custom fields” on page 34 for more information on creating your own custom fields.

10. On the Notes tab, enter any additional information you want to track for the client. If you have enabled data sharing by setting a file location for DT FileCabinet, notes will be shared with that application.

## Copying client information

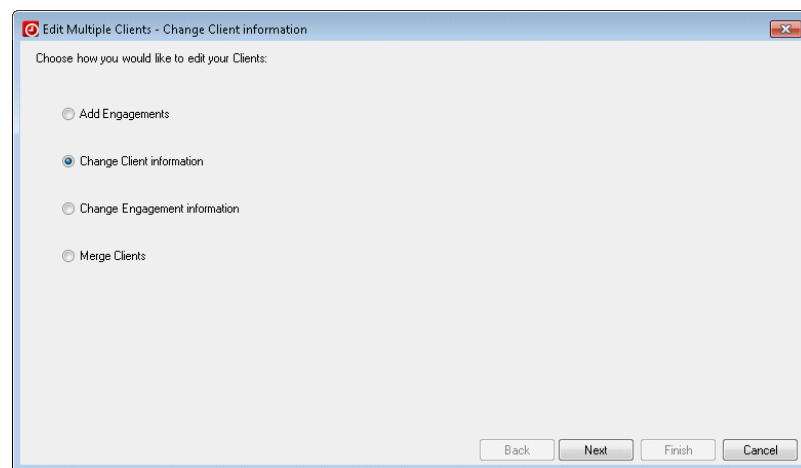
To facilitate client setup, you can create a copy of an existing client when adding a new client, and then modify the new client's information as needed. You can also copy selected client information from an existing client to a new client. For details, see the topic [Setting up clients](#).

## Editing multiple client records

The Clients setup screen includes an **Edit multiple Clients** link at the bottom of the screen. Click this link if you want to add one or more engagements or projects to multiple client records at once, or if you want to change client information for multiple clients. You can also merge information for one client with that for another client.

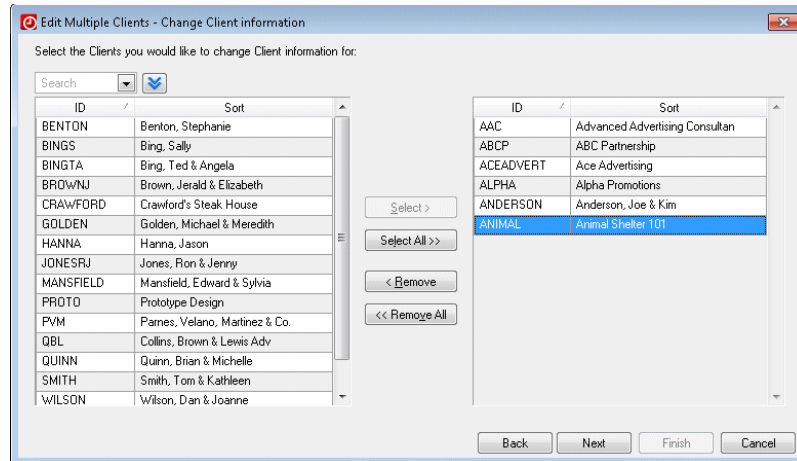
**Note:** To add projects, you must be licensed for the Project Management module.

1. In the Edit Multiple Clients dialog, click one of the available options. In this example, click the *Change Client information* option.

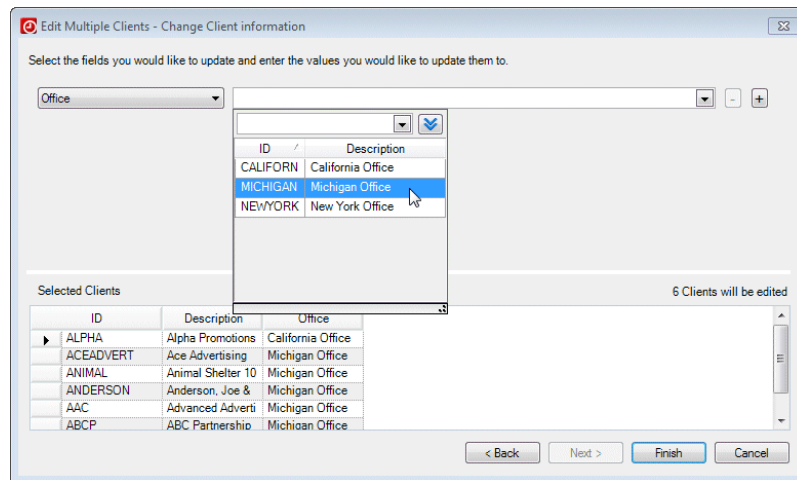


2. Click Next.

- On the next screen, select the clients that you want to work with.

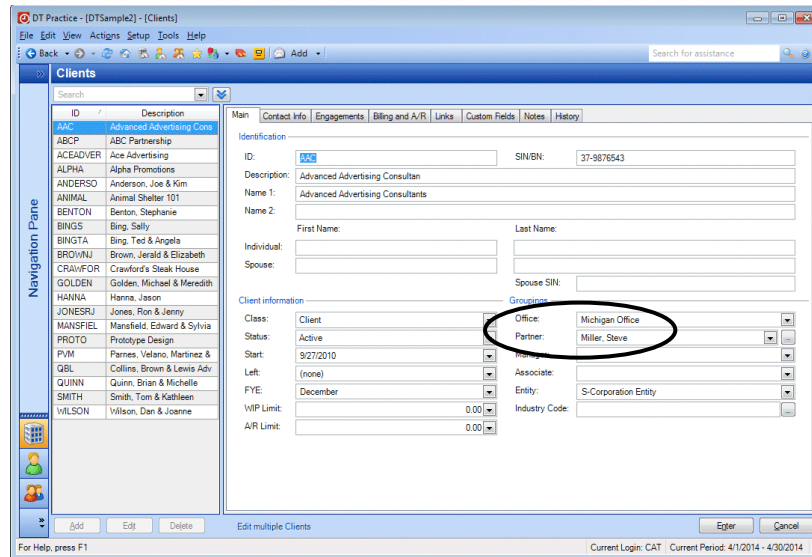


- Click Next.
- Choose which items to add or change for those clients. In this example, change the assigned Office of the selected clients. Select **Office** from the first drop-down list and select an office from the second drop-down list.



**Note:** Items in the lists change depending on which option you initially select, and on what type of information you are changing.

6. Click the Finish button to complete your changes.
7. At the prompt, click Yes to confirm.
8. The changes are reflected in the Clients setup screen.



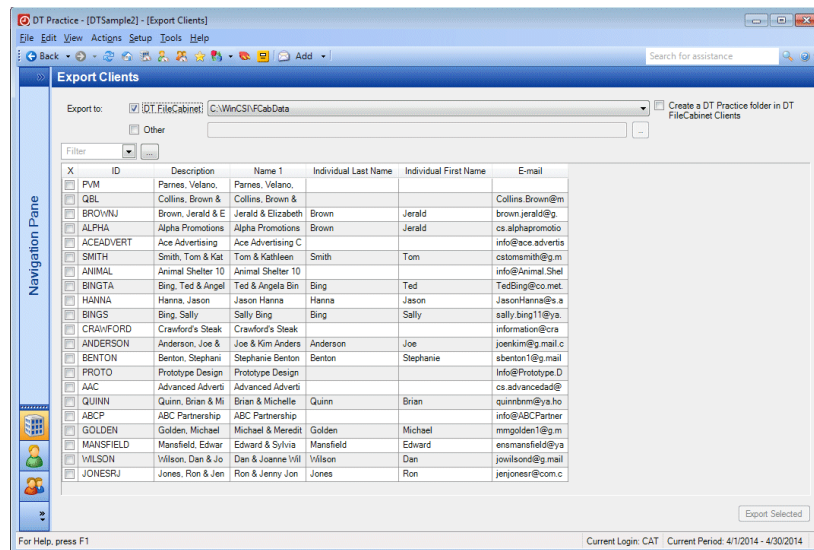
## Exporting clients to DT FileCabinet

If your firm is licensed for DT FileCabinet, you can export clients from DT Practice. This process creates a drawer for each exported client in DT FileCabinet. You can also choose to create a DT Practice folder for each new drawer.

1. Choose File > Export > Clients.
2. On the Export Clients screen, mark the *DT FileCabinet* checkbox.

### Notes

- If you want to create a DT Practice folder in each new client drawer, mark the *Create a DT Practice folder in FileCabinet Clients* checkbox.
- If multiple data locations exist for DT FileCabinet, you can select the desired location from a drop-down list.



3. Select the clients you want to export by marking the checkboxes for each. You can filter the client list to narrow your selection.
4. When your selections are complete, click the Export Selected button. DT Practice exports the selected clients to DT FileCabinet.

**Note:** You can also export clients to a standalone XML file. Mark the *Other* checkbox on the Export Clients screen, then click the  button and navigate to the folder where you want the XML file to be saved.



## Pre-processing setup

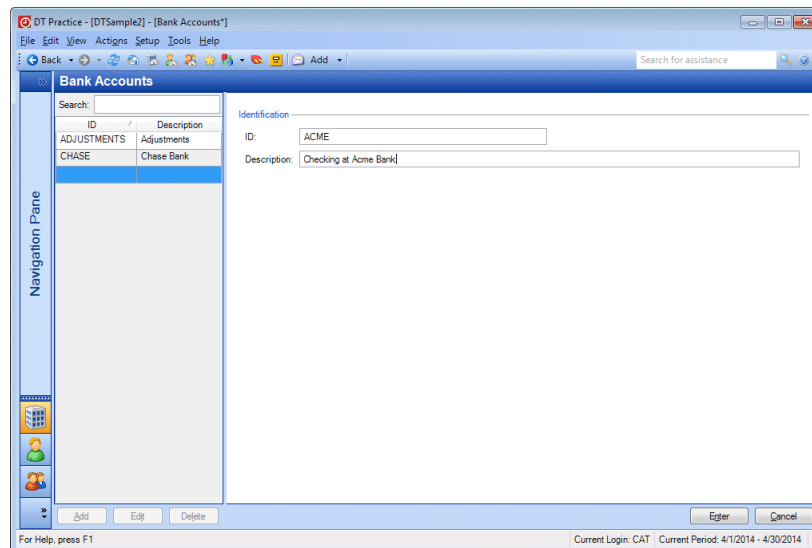
In addition to the setup of the core components of DT Practice, there are other setup tasks that you will want to perform before using the application to process your firm's data.

### Setting up bank accounts

By setting up bank account records in DT Practice, you can associate cash receipts with the accounts to which you deposit them, and group receipts by bank account for reporting.

To create records for your firm's bank accounts, follow these steps.

1. Choose Setup > Bank Accounts.
2. Click the Add button at the bottom of the screen.
3. Enter a brief identifier in the *ID* field, such as "ACME" for Acme Bank.
4. Enter a description (up to 30 characters) in the *Description* field, such as "Checking at Acme Bank."



5. Click Enter to save the record.

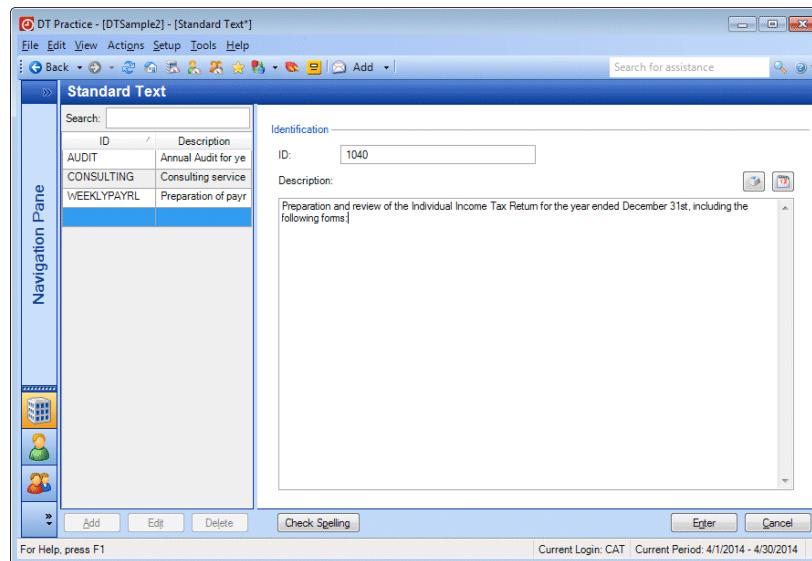
The records you create on this screen are available as selections for the *Bank Account* field in receipt and adjustment entry.

## Setting up standard text



Standard text items are reusable blocks of text that you can set up to save time during data entry. These blocks of text can be selected to appear on invoices or statements.

To create standard text items, perform the following steps.

1. Choose Setup > Standard Text to open the Standard Text setup screen.



2. Click the Add button to add a new standard text item.
3. Enter a brief ID that will be easy for you and your staff to remember. For example, you may want to identify text describing preparation of individual tax returns as "T1."
4. In the *Description* field, enter appropriate text.

**Note:** The buttons above the *Description* field   enable you to include variable dates in standard text, along with text prompts that instruct your staff to enter information to complete the standard text item. For more information on these features, see the topic [Standard Text overview](#).

5. Click Enter to save the item.

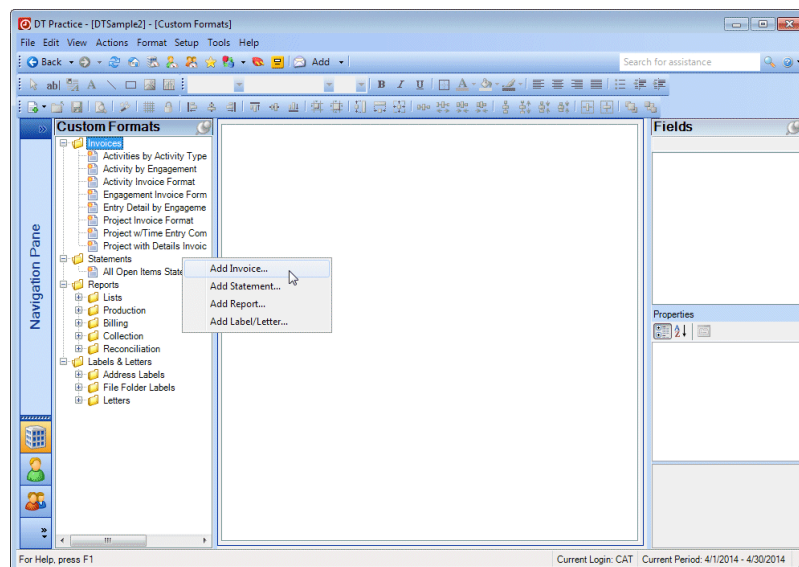
The standard text entries you enter here are available in comment fields during time and expense entry, receipt and adjustment entry, and billing.

## Customizing invoice and statement formats

In DT Practice, you can create customized invoices and statements to best suit your firm's needs.

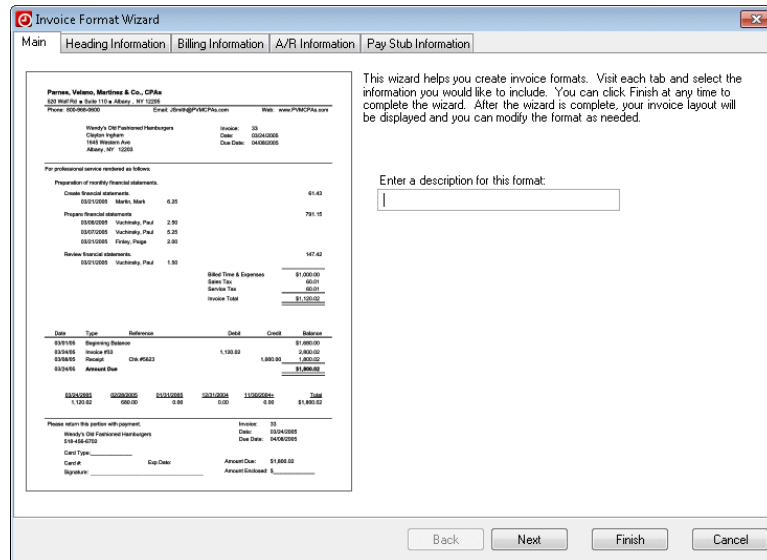
**Note:** You can also create custom reports, labels, and letters.

1. Choose Setup > Custom Formats to open the Custom Formats setup screen.
2. In the Custom Formats pane, right-click and choose a command from the context menu, such as Add Invoice.




A format wizard opens to guide you through the process of creating your invoice or statement.

3. On the Main tab, enter a description for the custom format and click Next to continue.



4. On each of the other tabs, mark checkboxes for the information you want to include and clear checkboxes for the information you want to exclude from the invoice or statement. For invoices, you can use the Billing Information tab to group data and select individual entry detail fields for inclusion.
5. Click Finish. DT Practice displays your invoice or statement in a format designer pane, where you further customize the document.

You can edit existing formats by right-clicking them in the Custom Formats pane and choosing Edit from the context menu. You can also add custom charts to invoices and statements.



For more information on customizing invoices and statements, click the help button  within the Custom Formats setup screen.

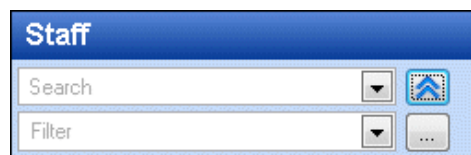
## Filtering your data

DT Practice provides the ability to create filters for much of the data you set up throughout the application (such as client, staff, or office lists). Filters let you reduce the size of lists of data to make them more manageable. For example, your firm may have hundreds of clients and multiple offices, and you might want to see only the clients for your office. Filtering the list saves time by making it easier to find the data you are looking for.

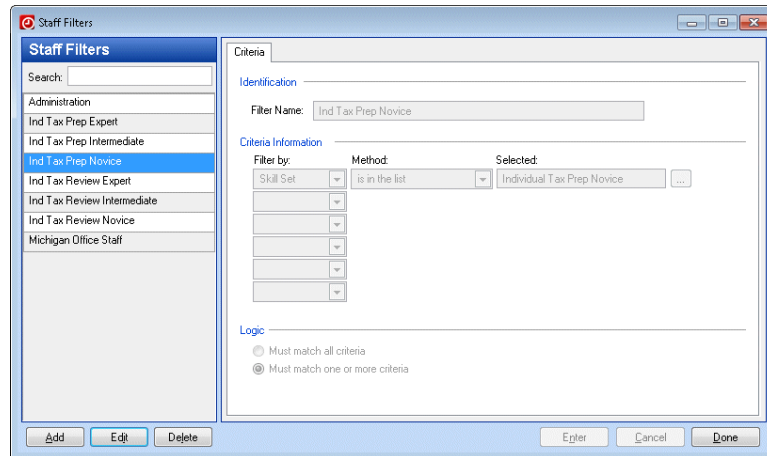
**Note:** You can also apply a quick filter for the screen you are viewing. Instead of following the steps below to add a new custom filter, select an item from the *Filter* field and complete the filter by choosing a method and the desired filter, range, or individual items. The filter you apply to a screen will be remembered and applied when you next return to the screen. If the quick filter options do not meet your needs, use the steps below to create more complex filters.

The following exercise shows how to create and use a filter. You will create a filter so that the staff list shows only the staff for the tax department.

1. Choose Setup > Staff to open the Staff setup screen.
2. Click the  button to display the *Filter* field.
3. Click the  button next to the *Filter* field to open the Staff Filters dialog.

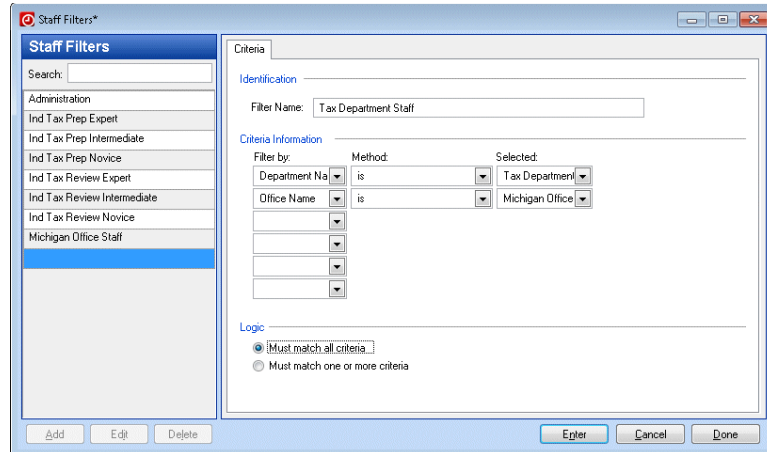


- In the Staff Filters dialog, click the Add button to create a new filter. The left pane of the dialog contains the names of any Staff filters that have already been set up.

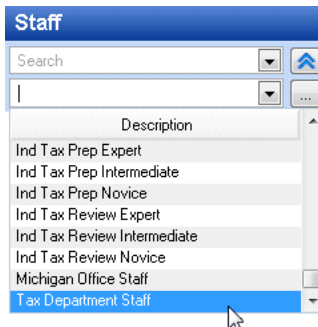


- In the *Filter Name* field, enter **Tax Department Staff**.
- In the Criteria Information section, you can select multiple criteria for your filter from the drop-down lists. In the first row, make the following selections.
  - Filter by:* **Department Name**
  - Method:* **is**
  - Selected:* **Tax Department**
- In the second row, make the following selections.
  - Filter by:* **Office Name**
  - Method:* **is**
  - Selected:* **Michigan Office**

- The options in the Logic section let you specify whether items in the list must meet any or all of the criteria. Click the *Must match all criteria* option so that the filter includes **only** tax department staff belonging to the Michigan office.




- Click the Enter button to save the filter.
- Click the Done button to exit the Staff Filters dialog
- In the *Filter* field of the Staff setup screen, select the **Tax Department Staff** filter from the drop-down list. DT Practice applies the filter automatically.




- The Staff list now shows only the tax department staff belonging to the Michigan office.

---

### Notes

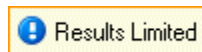
- When you create a filter for a setup item, that filter will be available throughout the application. For example, if you create a filter for staff, that filter will be available wherever you can filter by staff.
- If you click the  button to collapse the search and filter area while a filter is active, DT Practice will display the filter criteria next to the *Search* field.



- To remove a filter and return to a comprehensive view, click the  button in the *Filter* field.
- 

### Result limits

In certain DT Practice screens, performance can be significantly affected after substantial amounts of historical data are present in the database. To improve performance in DT Practice wherever large lists of items are displayed, results are limited to a pre-determined maximum size. When a screen displays results that are limited, the message Results Limited appears above the list.



If the data you are looking for is not included in the limited results, refine your sort order, search criteria, and/or filter to narrow down the data displayed in the list. The Results Limited message will appear until all results from your filter and / or search criteria can be displayed.

If the data you are looking for is not included in the list, refine your sort order, search criteria, and/or filter to narrow down the data displayed in the list. To display more items in the list, click the Get More Items button.





See the topics [Filtering your data](#) and [Using the search feature](#) in the DT Practice Help & How-To Center for more information on creating your own filters and using the search feature.

---

## User-specific setup

Staff members can customize portions of DT Practice to suit their personal preferences. These setup tasks can be performed at any time, and personal settings can be modified without affecting firm data or the settings of other users.

### Staff Dashboard

DT Practice provides a Staff Dashboard that can be customized with various portlets that display information for quick access and viewing. For more information on adding portlets and customizing the staff dashboard layout, see “Dashboards” on page 19.

## User preferences

Some settings in DT Practice can be customized by each staff member to speed data entry and increase efficiency. Preferences are unique for each staff member. Choose Setup > User Preferences to access these settings.

The screenshot shows the 'User Preferences' dialog box with the 'Billing' tab selected. The 'Settings and field defaults' section contains a table with the following data:

Entry Field	Default	Skip	Hide	Description
Control Date	Today's Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Bank Account	Chase Bank	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adjustment Bank Account	Adjustments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date	Control Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Client				<input checked="" type="checkbox"/>
Type Description	Check	<input type="checkbox"/>		<input type="checkbox"/>
Reference		<input type="checkbox"/>	<input type="checkbox"/>	
Comments		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Invoice Search		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Links Button		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom Fields Button		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

The 'Entry' section contains the following options:

- Automatically apply receipts to oldestfirst
- Automatically display applied amounts
- Automatically displayLinks entry
- Automatically display Custom Fields entry
- Implied decimal on amounts
- Automatically check spelling

The 'Display settings' section contains the following options:

- Display hash totals

The 'Start-up tab:' dropdown menu is set to 'Entry'. At the bottom, there is a link 'Reset to new Staff defaults for Firm' and 'OK' and 'Cancel' buttons.

**Note:** If you want to restore all of your user preferences to the default settings for your firm, click the **Reset to new Staff defaults for Firm** link. Firm defaults are specified in Setup > Firm > Preferences tab. See "Preferences tab" on page 37 for more information on firm preferences.

### System tab

The System tab provides checkboxes for toggling an alternating background color in lists and using the Enter key to move between fields.

In the *Favorite screen* field, you can specify the screen that appears first each time you start DT Practice. If you are licensed for the Project Management, Client Management, or Staff Management modules, this dialog provides checkboxes for enabling desktop notifications for monitored events and showing desktop notifications until closed. You can also reset the *Don't show this message again* checkboxes for all messages, enabling you to once again view messages that you previously turned off.

**Time & Expense Entry tab**

The Time & Expense Entry tab provides options to help you speed up time entry by specifying field defaults and skipping or hiding certain fields. This tab also provides various rounding options, data entry and display settings, and checkboxes for working with the timers. By marking checkboxes in the Description column, you can choose to display the descriptions for the *Client*, *Engagement*, *Project*, and/or *Activity* fields in Time & Expense Entry.

**Billing tab**

On the Billing tab, you can select default settings for client billing, including whether to bill by clients, engagements, or projects; to show WIP when selecting clients to bill; default start-up tab and invoice date settings; and rounding options. You can also choose to automatically apply open credits during billing, and to automatically select subsidiary clients when selecting parent clients. Under Time & Expense Descriptions, mark or clear the checkboxes to choose which fields to display or hide in billing grids.

**Receipt & Adjustment Entry tab**

The Receipt & Adjustment Entry tab provides options for skipping or hiding fields during receipt entry, and various entry and display settings. By marking checkboxes in the Description column, you can choose to display the descriptions for the *Bank Account*, *Client*, and/or *Type* fields in Receipt & Adjustment Entry.

---

## Before you begin processing

These final steps should be performed after you have completed application setup, and before you begin using the application to process your firm's data.

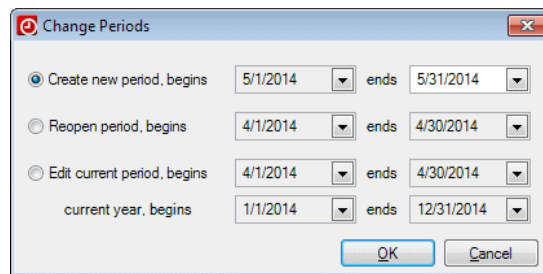
## Entering beginning balances

Enter balances into the application as of the end of the period prior to the one in which you will begin using DT Practice for processing. For more information on this process, see the topic [Entering beginning balances](#).

## Changing processing periods

When your firm begins to use DT Practice, you will need to set the current year and processing period within the application.

1. Choose Actions > Change Periods to open the Change Periods dialog.
2. With the *Create new period* option selected, enter appropriate dates for the processing period.



3. If necessary, click the *Edit current period* option and change the year designation to reflect your firm's fiscal year.
4. Click OK.

Return to this dialog each time you need to move forward to a new processing period. You can also re-open a previous period by clicking the *Reopen period* option and choosing the appropriate date.

---

---



## Processing Overview

This chapter describes several of the key tasks you can perform in DT Practice, including tracking time and expenses, billing your clients, entering receipts and adjustments, assessing service charges, printing reports, and backing up your firm database.

---

### Tracking time and expenses

DT Practice lets you track time, costs, and expenses incurred while providing services to clients. Time and expense entry is designed so that you can track time and expenses according to which staff member performs the work and what type of work it is so that you can bill accordingly. You can enter time and expenses one staff member at a time or for multiple staff. Your firm can also choose to review and approve timesheets before posting them.

### Setting time and expense entry preferences

DT Practice allows you to select both individual preferences to streamline time and expense entry, and firm-wide preferences to control how time and expenses are approved and posted.

**User preferences** allow individual users to choose how certain controls and areas of the application function to customize the application for their own needs. Choose Setup > User Preferences > Time & Expense Entry tab to specify default values for certain time entry fields, choose settings for displaying time entries, skip or hide fields during data entry, round off time recorded using the Timer, and more.

**Firm preferences** allow your firm to require that time and expenses be approved before posting. Choose Setup > Firm > Preferences tab, and mark the *Required for Time & Expense Entry* checkbox under Approval/Posting process.

## Entering time and expenses

In the Time & Expense Entry screen, individual staff members can enter their own time and expenses, or administrative staff can enter time and expenses for multiple staff members.

- The Entry tab is designed for staff who enter their own time and expenses. There are separate subtabs for entering time and expenses.
- The Overview tab is intended mainly for firms that have staff who enter time and expenses for other employees. You can use this tab to view and enter time for multiple staff members at one time, and to enter both time and expenses in the same grid.
- If your firm has an approval process for time entry, use the Review tab to review and approve time and expense entries before they are posted.

---

**Note:** If your firm setup does not have the approval / posting process selected for time entry, the Review tab is not available.

---

## Entering time and expenses remotely

DT Practice includes a remote entry feature that enables staff members to enter time using their laptops while they are out in the field. Your staff can transmit their entries back to the office over an internet connection for immediate review and billing. Staff without internet access can make their entries available for review immediately after returning to the office and connecting to your network.

If you have staff who are off-site for prolonged periods, you can export updated remote entry setup data to an XML file and send it to them via email or other means.

---

## Managing projects


If you are licensed for the Project Management module, you can take advantage of the powerful project and task tracking features in DT Practice. With the Project Management module, your firm can:

- Manage and track projects and tasks
- Monitor staff assignments and deadlines

- Set up automatic notifications for project changes and deadlines
- Launch other applications to complete projects from within DT Practice, and time your work automatically
- Bill clients by project
- Generate project-based reports

The Manage Projects screen provides a central location where you can view, filter, and update projects and tasks for all of your clients.

The screenshot displays the 'Manage Projects' interface. At the top, there's a search bar and a 'Filter' dropdown. Below that is a table of projects with columns: #, Client ID, Client Description, Parent Client, Project, Project Description, Engagement, Due, Responsible, Assigned, Office, Extension, and Is. The table is filtered to show 'Open Projects only'. Below the table is a 'Tasks' section for the selected project (527, 1040 - Individual Income Tax Return). The tasks table has columns: Order, Description, Activity, Assigned, In Work Queue, Staff Qualifications, Target Start, Target Complete, Tracking, Started, and Completed. A 'Navigation Pane' is visible on the left side of the window.

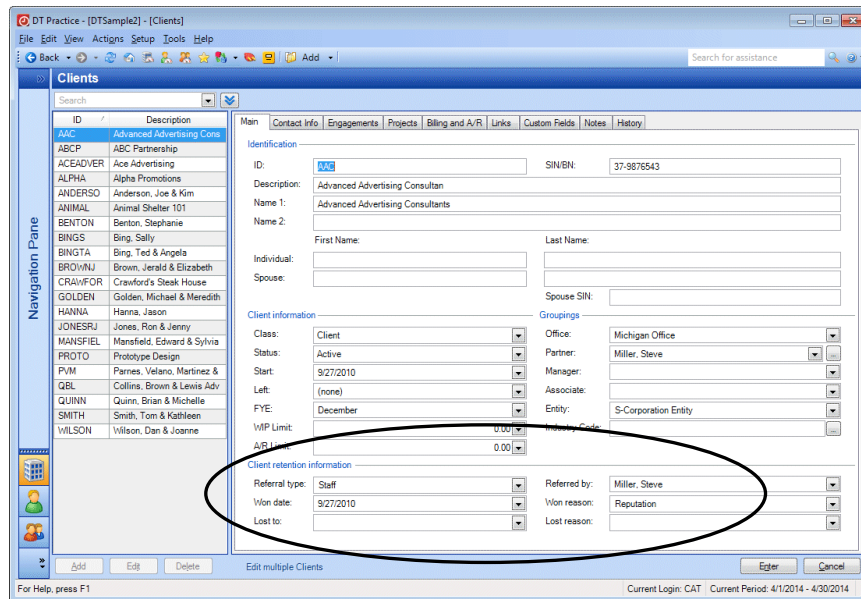
For details on specific features, click the  button and refer to the application's help.

**Note:** See “Setting up project management tools” on page 74 for information on setup tasks you should complete before using this module.

## Managing clients

If you are licensed for the Client Management module, you can use DT Practice to facilitate and strengthen your firm's relationships with your clients, business affiliates, and contacts; track referral sources for clients; and quickly locate information about contact interactions such as phone calls and emails.

You can enter client retention information in the Clients Setup screen to keep track of when and how your firm gains or loses a client.

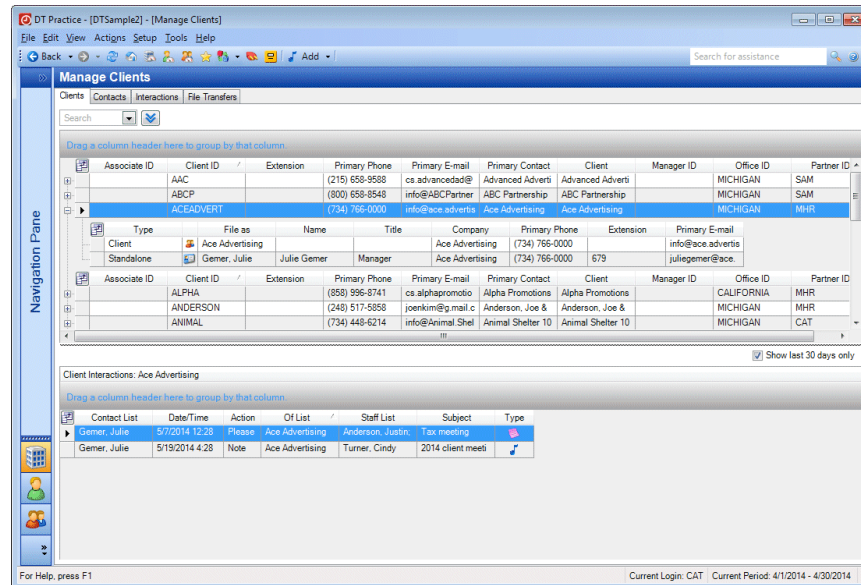


The Manage Clients screen provides a central location where you can track interactions with your clients such as phone calls, messages, and emails.

- The Clients tab enables you to see all of the firm's clients, the clients' contacts, and a list of interactions with the selected client.
- The Contacts tab lets you quickly locate all of your firm's contacts (whether or not they are associated with your clients) and add interaction information for selected contacts.




- The Interactions tab provides a list of all of the firm's interactions, which you can sort and filter to quickly find the interactions you are looking for.



If your firm is licensed for the Client Management module and uses Microsoft Outlook® as its email client, you can synchronize contacts in DT Practice with those in a selected Outlook contacts folder, enabling you to keep your contact information up to date and consistent between the two applications. You can do this manually, or set up DT Practice to synchronize automatically.

If your firm is also licensed for DT Firm Portal, you can take advantage of the file transfers feature to exchange files securely with contacts using DT Client Portal and DT Staff Portal.

For details on specific features, click the  button and refer to the application's help.

---

## **Managing staff**

If your firm is licensed for the Staff Management module, you can use DT Practice to set target hours for your staff, assign work according to staff qualifications and availability, track benefits such as comp time, assess staff performance based on predetermined targets for billable hours, and more.

To realize maximum benefits from the Staff Management module, your firm should define skill sets for its staff and set targets for billable hours and amounts, which enable you to take full advantage of the powerful scheduling and assessment features.

If your firm sets up administrative activities designated as accruable benefits such as vacation time, staff can submit vacation and other requests via DT Practice, and supervisors can approve requests quickly from a dashboard portlet.


For more information on Staff Management module setup, see “Setting up staff management tools” on page 59.

Staff can use dashboard portlets to select work items for which they are qualified from a queue and to view benefits balances.

The Manage Staff screen provides a central location where partners and other administrators can easily assign work items to staff based on qualifications, view information about accruable staff benefits, and compare staff productivity with targets.

The screenshot displays the 'Manage Staff' application window. On the left, there is a 'Navigation Pane' with a 'Calendar Options' section showing a calendar for April 2014 and a list of 'Displayed Items' including Outlook Appointments, Outlook Tasks, Projects, Tasks, Meetings, To Dos, Scheduled Phone Calls, Scheduled Benefits, and CPE Courses. The main area is titled 'Manage Staff' and shows a weekly schedule for the week of 4/7/2014. The schedule is organized by staff member, with Cindy Turner and Jeff Wilson listed. Assignments are shown as colored blocks with labels like 'Ace Advertising: MAR\WRITEUP' and 'Brown, Jerald & Elizabe'. Below the calendar, there is a detailed view for 'Turner, Cindy' showing a table of 'Urgent User Preferences'.

Client	Client Description	Description	Rem Hrs	Scheduled Hrs	Unscheduled Hrs	Target Start	Tar
ACEDVDR	Ace Advertising	Monthly Payroll	4.00	0.00	4.00		
ACEDVDR	Ace Advertising	941 Employer's Quarter	1.00	0.00	1.00		
ALPHA	Alpha Promotions	Review	2.00	0.00	2.00	4/3/2014	4/4/2
ALPHA	Alpha Promotions	Final Review	1.00	0.00	1.00	4/7/2014	4/7/2
BINGTA	Bing, Ted & Angela	Preparation	2.00	0.00	2.00	3/6/2014	3/10
BINGTA	Bing, Ted & Angela	Clear Review Comment	1.00	0.00	1.00	3/13/2014	3/14
BROVNIJ	Brown, Jerald & Elizabe	941 Employer's Quarter	3.00	0.00	3.00		
BROVNIJ	Brown, Jerald & Elizabe	Bi-Weekly Payroll	3.00	0.00	3.00	4/3/2014	4/4/2

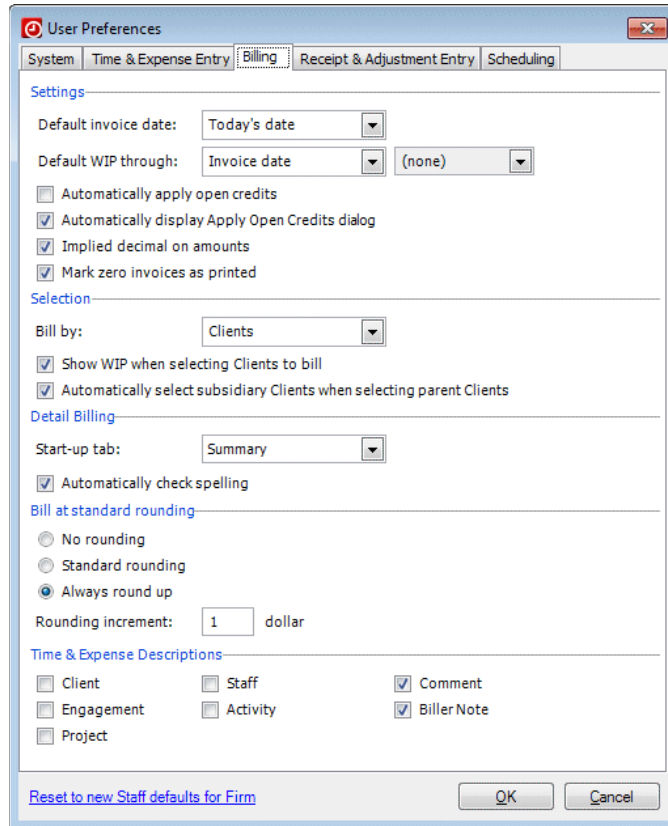
For details on specific features, click the  button and refer to the application's help.

## Billing your clients

DT Practice provides the flexibility and versatility needed for a wide variety of billing methods and invoice formatting requirements. Whether your firm bills at an hourly staff rate or fixed rate, periodically or on an as-needed basis, DT Practice can accommodate different methods based on your firm's arrangements with individual clients.

## Setting billing preferences

As with time and expense entry, you can select both individual and firm-wide preferences for billing. For individual user preferences, choose Setup > User Preferences > Billing tab.



To enable the approval process for billing, select Setup > Firm > Preferences tab, and mark the *Required for Billing* checkbox under Approval/Posting process.

## Billing your clients

To bill your clients, use the Billing screen. To open the Billing screen, you can choose Actions > Billing, select Billing from the Clients navigation pane, or press CTRL+B. In the Billing screen you can perform the following activities.


- Select the clients or engagements to bill.

---

**Note:** If you are licensed for the Project Management module, you can also bill by project.

---

- Select the WIP you want to bill.
- Edit WIP entries, if necessary.
- Enter the amounts to bill, including write-ups and write-downs.
- Compose and preview invoices.
- Approve, print, and post invoices.

For details on specific features, click the  button and refer to the application's help.

---

## Entering receipts and adjustments

DT Practice helps you track your accounts receivable and payments. Use the Receipt & Adjustment Entry screen to enter payments received from clients for your firm's services, and to make adjustments to client balances. With DT Practice, you can also assess service charges and print statements to provide clients with the status of their accounts.

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**Note:** Before entering receipts and adjustments, your firm administrator should set up bank account records. For more information, see "Setting up bank accounts" on page 89.

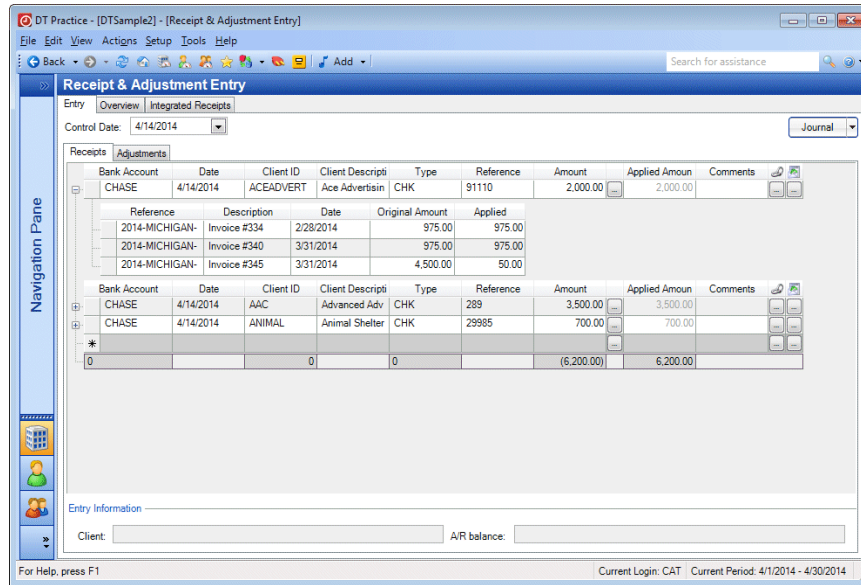
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### Setting up receipt and adjustment entry preferences

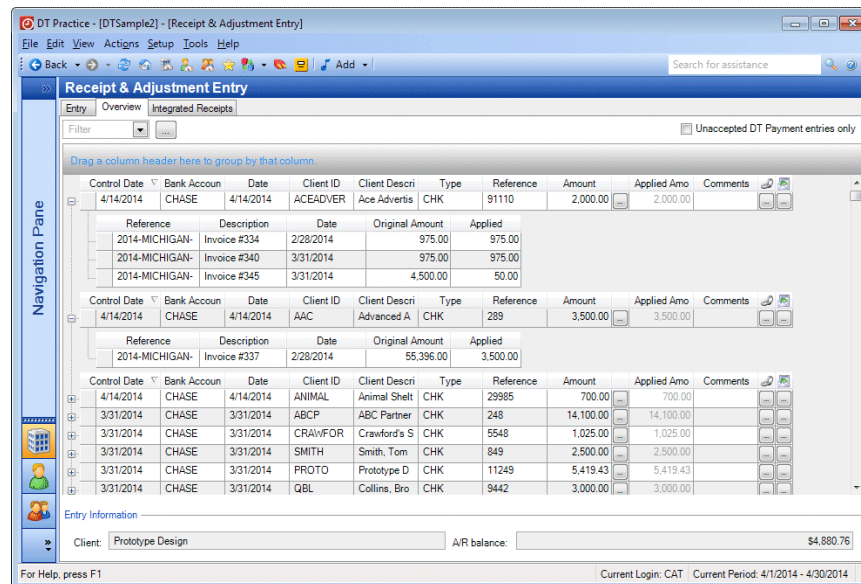
As with time entry and billing, you should also set up user preferences and firm preferences for receipt and adjustment entry before you begin. You can choose certain data entry defaults to speed up receipt entry, and you can enable the approval process at the firm level.

## Entering receipts and adjustments

The Receipt & Adjustment Entry screen provides two ways to enter payments. The Entry tab allows you enter receipts and adjustments in batches on separate subtabs, for a single control date.




In the Overview tab, you can enter both receipts and adjustments at the same time, across multiple control dates.



## Assessing service charges

Before you can assess service charges for past due invoices, your firm administrator must set up one or more service charge profiles for your firm, and then designate clients for whom your firm assesses service charges. For details on setting up service charges, see “Setting up service charges” on page 32. For more information about designating service charge rates for clients, see “Setting up client records” on page 79.

For details on specific features, click the  button and refer to the application’s help.

## Reporting

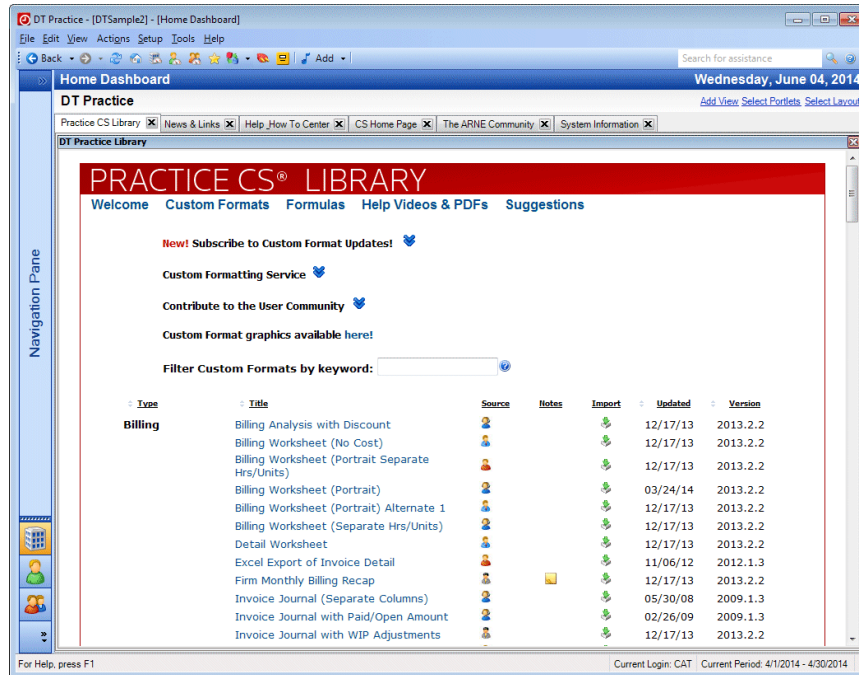
DT Practice reports give you access to the decision-making information you need to manage your firm effectively and to analyze your data for performance and profitability. To access the reports, choose File > Print Reports.

DT Practice provides the following categories of reports:

- Lists
- Production
- Billing
- Collection
- Reconciliation

If your firm is licensed for the Project Management, Client Management, and Staff Management add-on modules, you will also have access to reports related to those modules.

DT Practice enables you to create custom report formats (Setup > Custom Formats) with custom charts. You can also import custom report formats from the Library portlet, if none of the standard reports meets your needs.





To learn more about DT Practice reports, choose Help > Help & How-To, and then click **Printing and reporting** in the [Browse subjects for DT Practice](#) topic for a list of topics about reports.

---


## Backing up a firm database

When you want to make a backup of your firm's database, use the Backup command (File > Backup). The backup is performed on the firm database you currently have open. If you want to back up a different database, choose File > Open Firm and select the database you want to back up.

---

**Note:** Third-party backup software will not back up Microsoft SQL Server Desktop Engine (MSDE) data while the SQL Server Service is running. For this reason, the data cannot be backed up automatically from outside MSDE. Therefore, you must use the DT Practice backup procedure before running the third-party backup procedure.

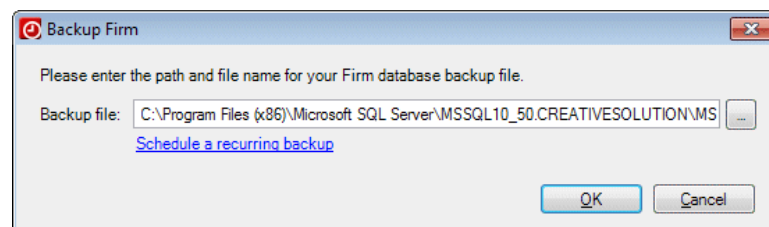
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1. From the File menu, choose Backup.
2. In the *Backup file* field, enter the path and file name for the backup file, and click OK. You can also browse to the backup location by clicking the  button next to the field.

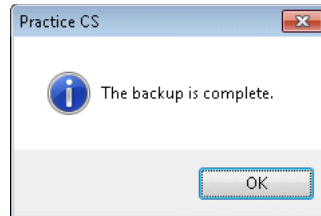
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**Note:** The backup file will be created on the computer where the data resides. The path specified here must be a valid path on that computer.

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3. When prompted that the backup is complete, click OK.



4. If necessary, copy the backup file from the location specified in the backup dialog to another computer, backup tape, removable hard drive, or other storage media, or to a location that will be backed up by your third-party backup software.

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**Note:** When you make a backup of a database, the application does not overwrite any existing backups. Each backup file name includes a date / time stamp. Backup files stay on the computer until you manually delete them in Windows Explorer.

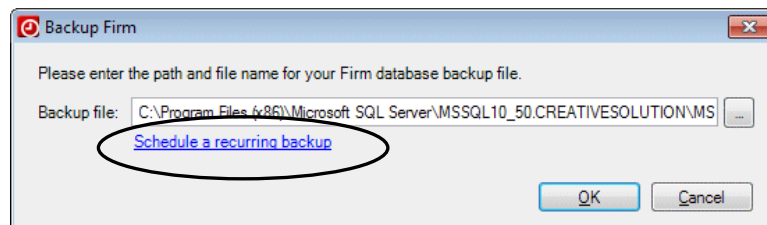
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## Scheduling a recurring backup of your firm database

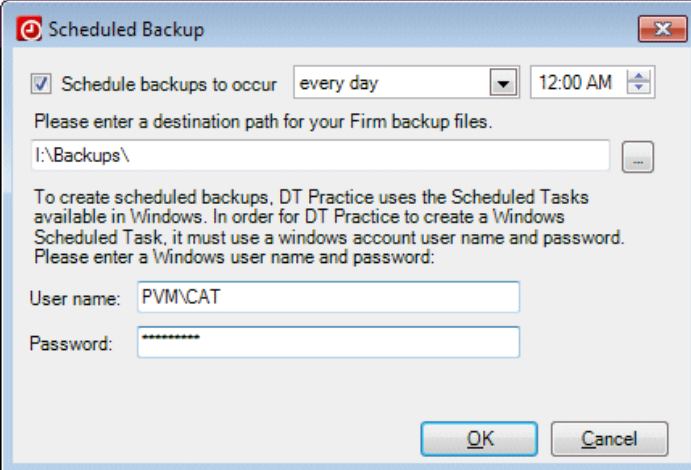
If you want to schedule a regular backup of your firm's database, use the Scheduled Backup dialog. To schedule a backup of your database, follow these steps.

1. From the File menu, choose Backup.
2. Click the **Schedule a recurring backup** link in the Backup Firm dialog.



3. In the Scheduled Backup dialog, mark the *Schedule backups to occur* checkbox.

4. Select a frequency from the drop-down list. You can select **Daily**, or select a specific day of the week.
5. Click the  buttons to select a time of day for the backup.
6. Enter a path for the backup file location, or click the  button to navigate to the location. This backup path must be a valid backup path on the SQL server.
7. In the *User name* and *Password* fields, enter a Windows account user name and password that have rights on the SQL server to create Windows Scheduled Tasks.
8. Click OK to save your scheduled backup information.



Schedule backups to occur every day 12:00 AM

Please enter a destination path for your Firm backup files.

I:\Backups\

To create scheduled backups, DT Practice uses the Scheduled Tasks available in Windows. In order for DT Practice to create a Windows Scheduled Task, it must use a windows account user name and password. Please enter a Windows user name and password:

User name: PVM\CAT

Password: \*\*\*\*\*

OK Cancel

---

**Notes**

- DT Practice will keep up to 11 scheduled backup files. The most recent backup file is called Backup.BDF. The next oldest will be named BackupArchive001.BDF, then BackupArchive002.BDF, and so on, through BackupArchive010.BDF, which is the oldest. The oldest of the 11 backup files is deleted whenever the newest one is created.
  - If your firm has multiple databases, you should not specify the same backup file destination for both scheduled backups. Doing so will limit the number of archived backups of each database retained, if they are scheduled for different times. If they are scheduled to be backed up at the same time with the same destination, only one database will be backed up successfully.
-

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## Appendix: Setting Up DT Connect

DT Connect is an electronic communications utility that works between your DT Professional Suite software and our data centers. It is installed automatically when you install DT Practice, and it provides you with a convenient and economical way to:

- Download initial and updated licenses. For more information, see “Obtaining and installing licenses via DT Connect” on page 10.
- Download application updates and user bulletins via the internet so you can electronically update your DT Practice application.

---

**Note:** Our data centers are scheduled to be available for DT Connect calls during all hours of the week. In the rare event that system maintenance is required, we will perform it between 3:00 a.m. to 6:00 a.m. eastern time.

---

The primary documentation for DT Connect is provided in the comprehensive help, which is accessible from the DT Practice Help & How-To Center.

This chapter describes:

- the basic features of DT Connect,
- the equipment you will need to use DT Connect,
- how to set up DT Connect, and
- tips for troubleshooting connection issues and error messages you may receive while using DT Connect.

---

### DT Connect features

With DT Connect, you can perform the following tasks.

- Download initial and updated licenses. For more information, see “Obtaining and installing licenses via DT Connect” on page 10.
- Download selected updates for your DT Practice application using DT Connect, as significant changes are made to the products throughout the year between releases.
- Download user bulletins and other documents via DT Connect to learn timely information and, when appropriate, helpful user tips.
- Update the credit card information on your DT Professional Suite account.
- Connect to the data center using a modem or an internet service provider.
- Make your calls in “unattended” mode. This allows you to schedule a time for DT Connect to automatically call the data center.
- Apply the software updates downloaded from the data center to DT Practice on the same computer or network to which they have been downloaded.

---

**Notes**

- There is no charge for using DT Connect to download and install licenses and software updates. For these routine activities you pay only for the telephone calls (for modem users) or for your internet service.
  - DT Connect encrypts all sensitive transactions involving monetary funds or client information using an industry-standard encryption system, thus keeping your data safe as it travels over the internet.
-

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## Equipment and other requirements

If your computer supports DT Practice, it also supports DT Connect. You do not need to purchase any additional communications software. However, you will need a persistent internet connection or a v.90 Standard 56K (or faster) modem to use DT Connect.

You have two options for connecting to the data centers with DT Connect.

- *Use an Internet Service Provider (ISP):* By default, DT Connect is configured to use a standard internet connection. This allows you to use your own ISP rather than connecting to the data centers' modems, thus saving long-distance charges. If your system is already set up to access the internet via your ISP, you probably do not have to complete any additional setup tasks to use DT Connect. However, you should confirm all settings, as described in "Setting up the communication configuration" below.
- *Use a modem:* Use this option to connect directly to the data centers using a modem rather than using your own ISP.

DT Connect is designed to work with a wide range of modems supported by Windows Dial-Up Networking, including the following:

- v.90 Standard 56K modems
- Any other standard internet connection (DSL, cable modem, T1, and so on)

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**Note:** If you use a modem to connect directly to our data centers, you may incur long-distance charges.

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## Setting up the communication configuration

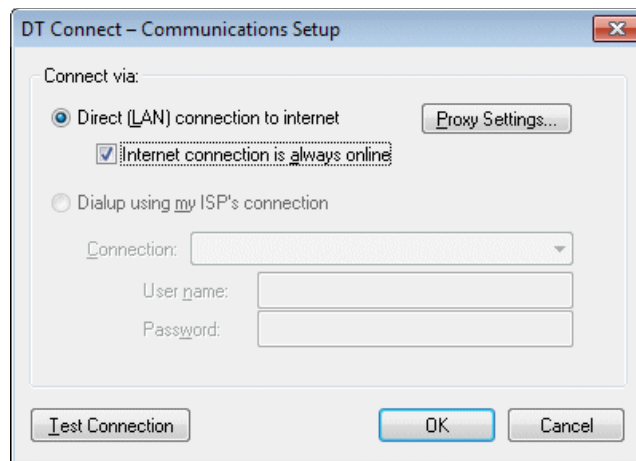
This section explains how to configure the communication settings in DT Connect, which is installed automatically when you install DT Practice. This is a one-time setup procedure and should be performed on each Windows workstation you intend to use for DT Connect.

### Notes

- If you used DT Connect to obtain and install licenses on this computer or to obtain software updates for any DT Professional Suite application, then your computer is already correctly configured for DT Connect.
- We recommend that you perform your first DT Connect call as soon as possible after receiving the application to ensure that you can communicate with our data centers before you need to receive licenses or software updates.

Note that DT Practice must be installed on your computer before you perform the following procedure.

1. Start DT Practice.
2. From the File menu, choose DT Connect.
3. In the DT Connect dialog, click the Connect Setup button to open the Connect - Communications Setup dialog. Use this dialog to verify or select the various communications settings applicable to your system so that you can communicate with our data centers.



- *Direct (LAN) connection to internet* — Click this option if your computer is connected to a network that has a direct internet connection.



- *Proxy Settings* — If your local area network uses a proxy server, click this button to open the Proxy Setup dialog. This dialog allows you to enter the necessary information for DT Connect to connect to our data centers.
- *Internet connection is always online* — Mark this checkbox if your computer is always connected to the internet.
- *Dialup to modems (normal long distance charges apply)* — Click this option if you do not have an internet service provider or a LAN connection, and you want to connect directly to our data centers via a modem. Note that you may incur long distance charges if you choose this option.
- *Dialup using my ISP's connection* — If you will connect to our data centers using an internet service provider, click this option.
  - *Connection* — If you will use an internet service provider to connect to our data centers, choose the name of your internet service provider from the drop-down list.
  - *User name and Password* — Enter the user name and password for the internet connection you specified.

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## Troubleshooting connection issues

For information about troubleshooting connection issues and error messages, choose Help > Help & How-To, and use the search field to search on **troubleshooting DT Connect**.

*Appendix: Setting Up DT Connect*

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