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Mar. 30, 2007

Tech2Go is a fast-paced roundtable discussion with Executive Editor Gregory L. LaFollette, CPA.CITP, and regular columnists Brent Goodfellow, Dave McClure and Randy Johnston. These thought leaders tackle current technology issues impacting the tax and accounting profession. This month, the panel discusses the Daylight Saving Time switchover, filing season updates, Office 2007 – especially Excel and Pivot Tables, CCH acquisitions of ATX and TaxWise, Practice Management software, and relevant upcoming trade shows and conferences. [Running time is 0:52:31]

Gregory L. LaFollette

CPA.CITP

Brent Goodfellow

CPA.CITP, MCSE, MST,  
MCT

Richard Oppenheim

CPA.CITP

*Special Guest*

Randy Johnston

## Tech2Go Show Notes

Episode 3 “March 2007

Recorded March 23, 2007

## Introductions

Greg LaFollette, Host

Richard Oppenheim, special guest

Randy Johnston

Brent Goodfellow

## Daylight Savings Time (DST) Change (3 minutes, 20 seconds)

- Significant amount of time spent on getting ready for changeover
- Minor quirky issues, Microsoft DST tool uninstalled Office 2007 without notice
- Another DST change set for the fall, but larger time window to prepare

## Filing Season Update (4 minutes, 40 seconds)

- Issues with the web-based filing system that CCH recently launched, but it is a

brand new fully from-scratch project

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- Good help on [Office Online](#) – click the [“Help and How-to”](#) tab
- File compatibility issues: Older formats do not always open up correctly, and files do not always save with full backwards compatibility.

### Microsoft Excel 2007

- Compatibility Mode: Different than just saving in a different version
- Add-In modules that depend on Excel from companies like Thompson and CCH will have to be re-written using the ribbon-style menus and toolbars for Office 2007.
- Pivot tables interface has changed quite a bit – makes it much easier to use, learn, and implement quickly.
- Page layout view with headers and footers visible and editable using the standard markup buttons available
- Support for imaginary numbers and other higher mathematical functions

### CCH Acquisitions – [ATX](#) and [TaxWise](#) (5 minutes, 40 seconds)

- Serves smaller businesses and markets, used in over 50,000 accounting firms
- CCH is looking to add volume by serving the smaller markets
- [CCH forms Small Firms Services Group](#), appoints Jeff Gramlich as president to keep products separate and focused on smaller firms

### Practice Management Software (6 minutes, 30 seconds)

- From Reader’s Choice Survey: Huge numbers of small firms use [QuickBooks](#) for time & billing, managing accounts receivable, and for managing customers
- [Thompson Practice CS](#) – Much more developed and advanced solution – different views for staff, firms, and clients
- CCH is right behind Thompson with a similar product launching soon
- Digital Dashboard for fully customized and individualized view for each person or group

– Expect more features from QuickBooks to better help smaller firms in the area of

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[Sleeter Group](#) – Las Vegas – October 22-26

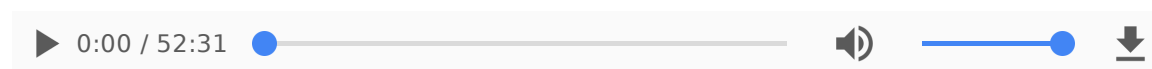
[Florida Accounting & Business Expo](#) – Orlando – May 31-June 1

[Illinois CPA Society Business & Tech Solutions Show](#) – Chicago – August 21-22

[Florida Institute of CPAs Annual Accounting Show](#) – Fort Lauderdale – September 20-21

[AICPA Tech+ – Las Vegas](#) – June 10-13

[Microsoft Small Business Summit](#)



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