running the Thomson Reuters CS Professional Suite. When combined with the optional modules for managing projects, clients, and employees, Practice CS provides a comprehensive toolset which meets the needs of many small and midsize firms.

Brian Tankersley • Apr. 21, 2014

Basic System Functions: 5 Stars

Practice CS is navigated from a task pane on the left-hand side of the user interface. The software includes major menu groupings for managing the Firm, its clients, and staff. Once a menus is selected, a short listing of common actions and controls related to this menu choice are presented to the user within the task pane on the left side of the screen.

Practice CS uses dashboards extensively, and while dedicated dashboard templates

timer is complete, the user can stop the timer from recording any additional time, and transfers the related timesheet entry into the application from the Timer screen in Practice CS.

The optional project management tools are an integral component of Practice CS. Projects are based on a series of templates which may contain a wide range of tasks, due dates, budgeted items, staff, and partner assignments. Once set up, a project may be rolled over to automatically regenerate upon the current period's project completion. Projects can be managed by partners to ensure that the staff workload balance is appropriate and that projects are on target to meet due dates within budget parameters.

Client dashboard is provided to show all client specific contact, invoice, and project information. All client-specific information housed within Practice CS may be accessed through this dashboard. Custom fields may be added based on firm preferences to better manage current and future clients.

Invoicing Functions: 4.75 Stars

Practice CS offers a number of invoicing options which can be made as simple or as complex as the firm and its clients require. Invoicing is based on the real time expense and billing information entered into Practice CS by the staff. Markups and markdowns can be handled individually at a detailed level or in batches when invoices are prepared. Outstanding items within a controlled group of companies can be grouped together and billed in a single invoice. Firms also have the option of using recurring invoices for routine, ongoing engagements like payroll tax preparation or client bookkeeping.

Once invoices are processed, they can be printed and mailed to the client, exported to Excel or PDF, or posted to the NetClient CS portal for the client. Clients are automatically notified once invoices posted, and have the option to pay invoice

groups, if used properly, can give firms a very granular set of access controls throughout the application.

A large number of report templates are included with the system, or users have the option to create their own reports with the included report writer. Reports are categorized, and a PDF manual showing examples of each template report is include from the product's Help file.

Integration/Import/Export: 4.75 Stars

Practice CS is designed to be the center of the accounting practice, and is the tool used to manage the professional services provided by the firm. Many of the CS Professional Suite applications include integrations with Practice CS. For example, UltraTax CS users can invoice clients for tax returns from within the UltraTax application with direct posting to Practice CS. As the status of tax returns are updated in UltraTax, the related project in Practice CS is updated for reporting purposes.

Help/Support: 4.75 Stars

Traditional help and support options are provided within Practice CS. An online knowledge base, PDF manuals, and a YouTube video section is maintained and updated by Thomson Reuters. Users can also solicit solutions to their problems from other users on the Thomson Reuters, ARNE (Accountant's Resource Network). Arnie is an online peer community, which allows users to exchange information, tips and ideas from other CS suite application users. Telephone support is also available on a callback basis on weekdays.

Program updates are processed on an as needed basis using the CS Connect service. CS Connect can be configured to download and install updates automatically, or users can manually poll for updates at any time. Users who access Practice CS through one of Thomson Reuters' SaaS programs (like Virtual Office CS) have

management, client management, and staff management modules all available as add-on features

Best Fit: Organizations who use the Thomson Reuters CS suite of applications for professional accounting firms, especially those who use the NetClient CS portals, Virtual Office CS, and GoFileRoom ES. The application meets the needs of most firms from two users up to large firms with hundreds of staff.

Strengths:

- Written using modern .NET development tools and customizable based on user preferences.
- Uses easy to understand dashboard views
- Firms can electronically present invoices to clients through the NetClient CS portals, and client can pay their bills to the firm via ACH using an optional service from Intercept EFT.
- The application can be installed on a firm's internal network, hosted on Thomson Reuters network using Virtual Office CS, or hosted by a third party IT service provider.

Potential Limitations:

- There are few, if any, integrations with between Practice CS and products outside of the Thomson Reuters CS Suite.
- The optional project management module is required to implement workflow management using Practice CS.
- Firms with more complex departmental structures and those wanting high-end ERP functions may better be served by Thomson Reuters Elite practice management solution.

Practice CS is designed to be the hub managing to work in an accounting firm