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Thomson Creative Solutions — Practice CS 2006

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Practice

CS, Version 2006.1.0 from Creative Solutions marks the second edition of its new environment and one component of a very large suite of integrated accounting and client service products. This product can easily be implemented for a small firm, but medium to large firms (upwards of 30 to 100 timekeepers) will make greater use of the suite approach and capabilities.

Ease of Use/Flexibility — 5 Stars

Installation was smooth, and the program immediately recognized my Outlook profile.

There were no difficulties in getting started, though for workstation installation it is best to not have other instances of MSDE running. Software developers are known for using “eye candy” to cover up missing components or help the user forget their frustrations with particular aspects of the package. In the case of Practice CS, the colorful interface is just a bonus to the experience. Taking design cues from Outlook, Practice CS makes use of dock-windows with menus sorted into three categories: firm, staff and clients.

A particularly appreciated factor is the “Setup” menu category, included both as a top-level dropdown and as a component of the three dock-windows.

All of the necessary steps for setup are found here, and can be entered or reviewed at a later date. User Preferences and System Settings are a part of the setup process, as are template design, custom fields, creating and maintaining groups, and the requisite employee and client setup. Other vendors take note: Using a setup menu is far easier to navigate than a setup window that includes 20 tabs and no way out until all information is entered.

Because this product is marketed to growing firms, it is important to note that the importing of data is not an intuitive process, though it appears that CS is working to improve this. For the purposes of testing, a small firm was set up and running in about an hour, complete with staff in/out status being posted. However, data entry could be a hurdle for larger firms, especially for those with a large number of in-progress engagements. Practice CS, as mentioned above, makes use of a SQL environment. Many custom options like description fields take an open-sized table approach rather than having to fill out a form that lists out options one to 40, or worse yet options one to four for a list that has seven entries. Templates can be created for engagements and projects. For anyone making templates, make sure your firm’s information is complete before starting. The design process is much smoother, and there will be a smaller likelihood of introducing problems at the template level.

There are a number of ways to set up activity codes, projects and groupings, which makes Practice CS highly versatile for all firm sizes. The only difficulty smaller firms may run into is the high level of customizability — to retrieve information and to manage the accuracy of input can require a large amount of time.

Scalability/Stability — 5 Stars

No stability issues were noted with the Outlook integration feature, nor were any noticed with the setup. The testing used for this review was not enough to tell how large of a data set can be efficiently processed by the software, though using a SQL database does help to ensure that very large record sets can be maintained. As Practice CS is part of a suite, the expectancy is that large firms’ client engagements can still be handled. Larger firms should consider the suite approach early on. This can often help to efficiently keep information organized. Luckily, small firms can rely upon just the core functionality

of Practice CS at first, though it would be wise to use the basics of engagements and projects early on. Extensive tasks and budgets are not a requirement and can be configured at a more convenient time.

Productivity Tools/Features — 4.5 Stars

Companies working toward a paperless office will appreciate the dashboard functionality.

Here, users can quickly find information regarding clients, staff, and time and billing. This provides current information in an easy-to-access format, which helps free up administrative time and encourages managers to actively monitor clients and engagements. For busier offices, employee scheduling is available, and the added Outlook integration can be useful for tying engagements and projects together with Tasks, E-mail, and Notes stored in Outlook. Other useful features specific to projects include the ability to set up recurring tasks, an individual-responsibility system for tasks and their associated budgets, and the option to set application links for fast access to programs related to a task.

Reporting — 4.5 Stars

Practice CS includes standard reports categorized as listing reports, production reports, billing reports, collection reports and reconciliation reports. While there are only 30 standard reporting templates provided, each one is infinitely customizable, which greatly extends the reporting capabilities of the program. Unique report templates can then be saved, allowing users to build a library of reports that best meets the firm's needs. Printing of reports allows for exporting to several formats including *.PDF, Microsoft Excel and text, as well as to e-mail and FileCabinet CS, which is useful for those firms that are integrating the company's document management solution. On a productivity note, several export methods can be chosen simultaneously. Previewed reports contain drilldown capabilities and tie back to the data set for quick and easy editing.

Support/Help/Updates — 5 Stars

Still in its infancy, Practice CS receives regular attention from Creative Solutions. As a core feature of the CS suite, it will continue to be maintained and have new features added. Thomson is known for being an attentive vendor, and continued user feedback is sure to add new features on an annual basis. Deborah Mahoney's five-employee CPA firm recently adopted Practice CS. She states that "the few minor problems have been solved by contacting Tech Support — they

have been so great to work with, and are just a phone call away.” The online support system is quite extensive, including seminars, a user forum, and a knowledgebase, all of which cover the complete suite of CS products.

Integration — 4.5 Stars

As mentioned earlier, integration with the CS Suite and Outlook is an important component of the product. You’ll have to rely on tools that can synchronize Outlook with your Palm or Pocket PC, as Practice CS has no native tools for linking to portable devices. Paul Hayden of Hayden CPA, a firm with about 300 clients, finds that “the most beneficial aspect of the program is the integration with the other CS products. Integration and sharing of data with other CS products like tax and accounting” drove his firm to select Creative Solutions.

Relative Value — 5 Stars

At a price of \$2,200 for 10 networked timekeepers and an annual renewal fee of \$450, this product is well priced and has excellent value for firms with fewer than 100 employees. :::::

2006 Overall Rating: 5 Stars

Article

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