

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

version of its Workpapers CS solution. The updates to the workpaper management software are designed to make it easier for firms to integrate, automate standardize tax engagements.

Aug. 29, 2013

[The Tax & Accounting business of Thomson Reuters](#) recently released an enhanced version of its Workpapers CS solution. The updates to the workpaper management software are designed to make it easier for firms to integrate, automate standardize tax engagements. Thomson Reuters provides financial and risk, legal, tax and accounting, intellectual property and science information and solutions to businesses and professionals.

Improvements included enhanced integration with UltraTax CS and other applications in the Thomson Reuters CS Professional Suite, as well as the addition of Source Document Processing as part of workpaper management functionality. With these new features, firms will be able to create seamless, integrated processes between Workpapers CS, Source Document Processing and UltraTax CS, allowing for a streamlined, end-to-end paperless tax workflow. Workpapers CS also automatically pulls folder structures from UltraTax CS.

“Reducing the time and resources it takes to complete tax prep work is a critical challenge for today’s firms,” said Scott Fleszar, vice president, Strategic Marketing, Tax & Accounting, Thomson Reuters. “The new enhancements to Workpapers CS provide additional tools that will help firms eliminate tedious data entry tasks, move more work from preparers to administrative staff, and ensure more accurate tax return preparation, all while reducing the overall time it takes to complete a tax return. Workpapers CS helps firms spend less time on compliance work and more time providing value-added advisory services to their clients.”

New features include:

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Documents Portlet.

- The ability to assign tax codes to multiple accounts at the same time using the Assign Codes feature from the Enter Trial Balance or Chart of Accounts screen.
- The ability to assign a default workpaper reference to folders within an engagement binder, streamlining the process of adding workpapers. Firms can also determine how each subsequent workpaper's reference should be incremented by setting these features in the folder properties dialog.

Designed specifically for automating tax engagements, Workpapers CS enables firms to electronically manage workpapers from a variety of sources. It incorporates a variety of features that make it easier to manage documents and data, perform trial balance calculations, and collaborate with other firm staff members. It can accommodate a wide variety of document types, and includes the ability to link documents to the trial balance for real-time, dynamic balance updates.

Workpapers CS also includes a variety of features that make it easier to route workpapers electronically and collaborate online, including the ability to sign off electronically on completed work and the ability to create notes and annotations for specific colleagues and specific workpapers.

On-premise users of Workpapers CS can install the new release from a web download or CD, while Virtual Office CS and SaaS for CS Professional Suite users will receive it automatically.

Advisory • Technology

(ANZSB) as a sponsor of continuing professional education on the National Registry of CPAs Sponsors.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us