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navigated, scalable product that can be customized to suit the needs of all firms. The product offers three deployment options; SaaS, Virtual Office CS, which combines ...

Mary Girsch-Bock • Apr. 23, 2016

From the 2016 Reviews of Practice Management Systems.

Best Fit: Thomson Reuters Practice CS is suitable for accounting firms of all sizes; though firms using other Thomson Reuters applications will see the most productivity from the product.

Strengths:

- Scalable product is well suited for accounting firms of just about any size

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- Product has limited integration capability with third-party applications

Designed to be used with other Thomson Reuters products, Practice CS is an easily navigated, scalable product that can be customized to suit the needs of all firms. The product offers three deployment options; SaaS, Virtual Office CS, which combines traditional licensing with SaaS Connectivity, and an On-Premise edition. New in 2016, Thomson Reuters added more product capabilities, and the ability see more features on-screen.

Basic System Functions: 5 Stars

Practice CS utilizes dashboards for most of the necessary navigation. A drop down menu is located at the top of each dashboard interface, so users can access system functions from this menu as well as directly from one of the four dashboards that are included with the product. The home dashboard allows users to set up frequently used portlets for quick access, such as Practice CS news feeds, RSS feeds and web pages. Users can also easily navigate to the other system dashboards form the home dashboard.

The firm dashboard offers access to management data including options such as WIP Recap, AR Recap, Billing Summary, and Key Firm totals. A vertical menu to the left of each dashboard offers access to other product options, departmental tools as well as access to the other dashboards. The client dashboard, like the others, is completely customizable, and offers an excellent overview of all client activity, including client demographic information, WIP billings and client contact information. The staff dashboard provides employees with access to their personal information, along with easy integration with Microsoft Outlook.
Practice CS offer excellent system security options, with managers able to create security groups, with each group assigned accessed to certain functions.

Time Management Capabilities: 5 Stars

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Doing so automatically starts the built in system timer. Multiple timers are available to be used if necessary. A floating timer has also been added, that will stay on a user's desktop, even if the practice management product is closed.The availability of the mobile app, which works with both iOS and Android devices allows those offsite to easily enter their time and expenses remotely, and for those without an Internet connection; time can still be entered, and later uploaded once a connection has been secured. Along with entering standard time and expense data, users can also access previous time entries, enter WIP adjustments, and even add comments or notes to entry fields.

Invoicing Functions: 4.75 Stars

Practice CS offers a wide variety of invoice formats, and the use of the invoice format wizard makes it easy to create custom invoices and statements. The product offers multiple billing options including fixed-fee, progress billing, and retainer billings. Employee can bill using several different methods including QuickBill, which allows users to bill a single client or choose to bill multiple clients from a list. The Recurring Billing option is a great solution for firms that bill clients on a recurring monthly basis. The Detail Bill option allows users to select the completed work that needs to be billed, leaving uncompleted items unbilled.

On-screen invoicing allows invoices to be previewed prior to processing, and staff can easily prepare invoices to be delivered directly to clients online using the Net Client CS Portal, where a client is notified that the statement or invoice is available for access. Users can also choose to print invoices, export them as PDF files, or to Excel. Markups can be processed for each individual client or by using a batching system, which is ideal for quicker processing.

Management Features: 5 Stars

Practice CS offers users four separate dashboard in their product, Home, Client,

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Realization provide management with excellent tools for evaluating and tracking employee productivity and efficiency. All reports contain drill-down capability, so users can easily locate and review originating documents.

Integration/Import/Export: 4.75 Stars

The Practice CS Employee Dashboard offers quick integration with productivity tools such as Microsoft Office, The dashboard also allows users to easily track tasks via the workflow activity function. Practice CS is designed to integrate with other Thomson Reuters products, providing firms with complete practice management capability, eliminating duplicate data entry. Mobile CS provides remote users with the ability to access the product from either iOS or Android devices. Reports and invoices can be sent to other Thomson Reuters applications such as FileCabinet CS or GoFileRoom for easy document management capability. All system reports can be saved in a variety of formats including PDF, HTML, Rich Text Format, Text, Tagged Image File, and can also be exported to Microsoft Excel.

Help/Support: 5 Stars

CS Professional Suite – which Practice CS is a part of, offers an excellent website that provides users with a number of help tools. The Support page of the Thomson Reuters website offers users the Excellent Help and How-To Center provides users with the ability to search for specific information for a variety of products and issues. Users can also access and download all product updates from the support page as well as contact support professionals. There is also a community forum that can be accessed, where questions can be asked and answered from the CS Professional Suite community of users. Help options are available throughout the product as well.

Product support is available via telephone or email, during regular business hours. The website also offers a comprehensive video overview of the product, and training

options such as on-demand, web, and classroom training are available, as is custom

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