DT PRACTICE

Multiple Innovation Award Winner—Practice CS and Staff Management

The CPA Practice Advisor gave objective recognition to Practice CS in 2007 and

FIRM DASHBOARD

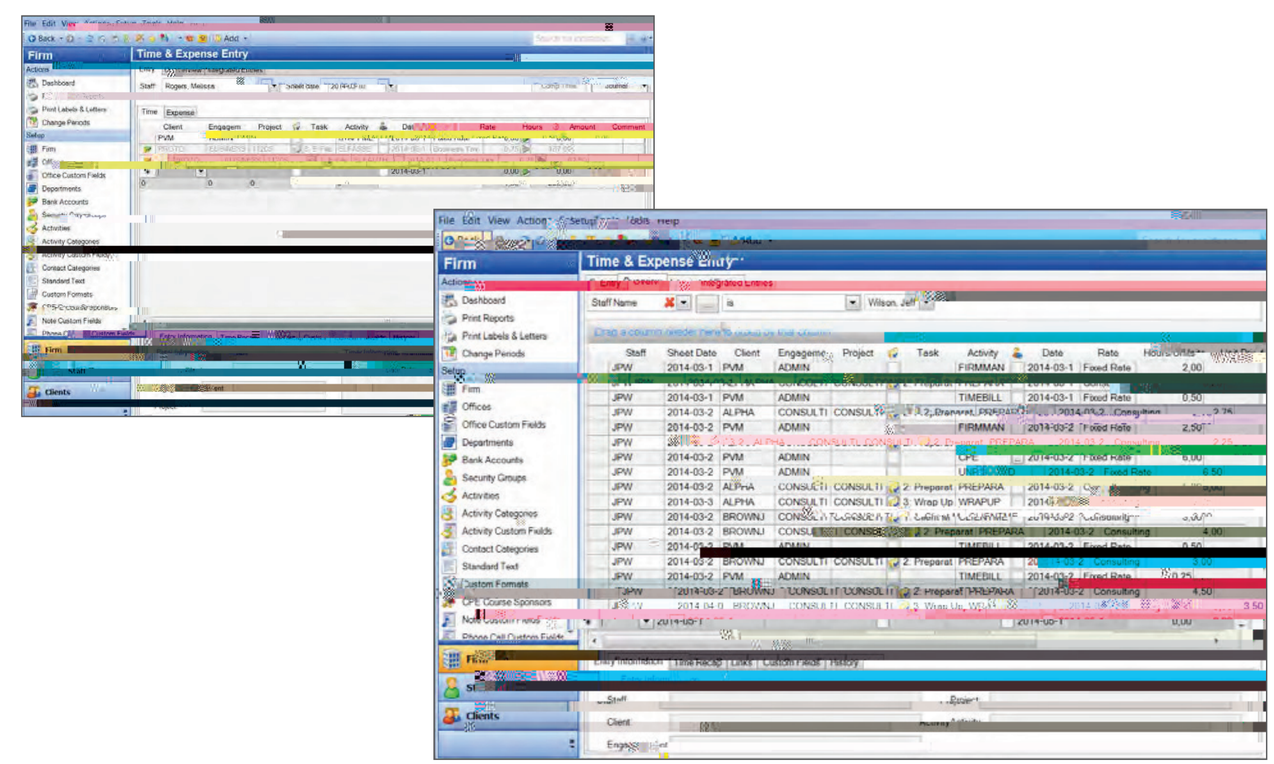
SEE THE STATUS OF YOUR FIRM AT A GLANCE

The Firm Dashboard provides a quick view of the state of your rm's production, billings, and staff productivity. This consolidated view makes it easy for you to quickly assess the nancial status of your rm without having to search in multiple locations. To maintain security, you can restrict this view to partners and/or other selected employees.

Firm partners and other authorized staff can refer to the Firm Dashboard to review such items as:

- Key nancial totals.
- Recaps of Work In Process (WIP) and accounts receivable.
- A summary of staff hours and billable time, as well as staff availability.
- Any standard or custom report—a report can be added to your dashboard as a portlet, allowing rm members to get real-time data on-screen—without having to print a report.

PROGRAM SETUPAM IUPP



POWERFUL AND FLEXIBLE REPORTING

GAIN VALUABLE INSIGHT WITH COMPREHENSIVE REPORTING

The robust and exible reporting capabilities within DT Practice enable you to quickly access and print detailed information about your rm, clients, and staff that will help you gain valuable insight into your business.

The comprehensive reporting features enable you to:

- Pull standard or custom reports onto any dashboard, giving staff access to real-time information.
- Use powerful ltering capabilities to identify clients and staff members based on any criteria.
- Select the detail and groupings for each analytic report, such as by client, engagement, staff member, activity, or other, with appropriate subtotals.
- Use the Print Preview Find feature to quickly locate speci c details.
- Drill down within each report to view and even modify underlying sources of data.
- Output and email different types of les, like Adobe PDF, HTML, Rich Text Format, Text, Tagged Image File, and Microsoft Excel.
- Easily send reports to DT FileCabinet.
- Create pro les for frequently used reports to automate the reporting process.
- Create custom reports.
- Display any report (standard or custom) on a dashboard for real-time review.
- Access the DT Practice Library Portlet to view and download a variety of report formats.

STANDARD REPORTS PROVIDE IMMEDIATE INFORMATION

Report types include these categories, as well as 150+ custom formats in the DT Practice library:

- Listing Reports
- Production Reports
- Billing Reports
- Collection Reports
- Reconciliation Reports

And to enhance visual representation, you can choose to include charts on several standard reports.

CUSTOM FORMAT DESIGNER

DESIGN THE REPORTS, INVOICES, STATEMENTS, LABELS, AND LETTERS NEEDED FOR YOUR FIRM

Custom Formatting is built into DT Practice to give you the exibility you need to produce communications quickly and easily. With the easy-to-use custom formatting options, DT Practice allows you to create and modify existing standard formats, including content, layout, and appearance, and lets you create new invoices, statements, reports, labels, and letter formats to meet the daily needs of your rm.

The Custom Format Designer makes it easy to customize layouts and add rows, columns, and information for the presentation you desire.

The Custom Format Designer allows you full control to:

- Click and drag from a list of available elds and properties.
- Design multiple items simultaneously with the tabbed view.
- Control formatting options for fonts including size, color, bold, italics, strikeouts, and underlining.
- Use Rich Text with additional formatting.
- Add lines, photos, logos, and watermarks.
- Preview the item you are designing with live data as you work.
- Import and export formats.
- Pull custom elds into a custom format.
- Build calculated totals based on multiple elds.
- Include a visual representation of your data by adding customized charts to custom and standard reports using the Charts Wizard.

CUSTOM FORMULA EDITOR—SHOW WHAT YOU WANT, THE WAY YOU WANT IT

The Custom Formula Editor lets you add calculated elds to custom formats. This editor makes it easy to modify calculations that are critical to analyzing procedures. You can:

- Select elds and enter amounts to create custom formulas.
- Add, subtract, multiply, divide, and create conditional expressions.
- Save your custom formulas for use with other reports.

ACCOUNTS RECEIVABLE PROCESSING

STAY ON TOP OF YOUR CASH FLOW

DT Practice can help you maintain accounts receivable quickly and easily, enabling you to:

- Enter receipts and apply them manually or automatically to outstanding balances.
- Enter different adjustment types, including credit memo, credit card return, debit memo, non-suf cient funds, and write-offs.
- Select from two different entry styles when entering receipts and adjustments—you can enter daily or in overview mode that displays multiple dates.
- Use the optional review process to require that all entries be approved and posted before inclusion in rm reporting, invoices, and statements.
- Print a journal of receipts and adjustments from the entry screen.
- Create service charges for overdue accounts.
- Send customized statements to clients showing the status of their accounts.

DT CLIENT PORTAL EXPANDS ONLINE CLIENT COLLABORATION

DT PRACTICE MOBILE

ON-THE-GO-ACCESS TO YOUR FIRM DATA ON YOUR IPHONE®, iPAD®, AND ANDROID™ DEVICE

Manage your rm from anywhere. DT Practice Mobile is an app for your mobile device that lets you access the key indicators you use to make decisions and run your practice every day. It's the easy option to get important rm information on your Apple® iPhone, iPad, iPod touch® , or Android™ device.

Exclusively for tax and accounting professionals – the DT Practice mobile app gives you on-the-go access to important rm, staff, and client data 24/7, from anywhere. The information automatically ows directly into DT Practice where you can view it and other important DT Practice data to help you make smart business decisions on the spot. Stay connected and in control of your bottom line with key features, such as:

- Staff Availability – Check staff work load, phone messages, contact information, and noti cations.
- Firm Financials– Monitor your rm's nances and your investment in individual clients through WIP Recap, A/R Recap, Key Totals, and Five-Year History.
- Staff Active Timers - See exactly what your staff is working on.
- Time Recap, assigned Projects and Tasks, and Noti cations - Stay on top of your responsibilities and productivity.
- Kilometre Tracking - Track kilometres in real time using GPS or after-the-fact by mapping a route between two addresses and use that distance to calculate an expense entry.
- Receipt Tracking - Automatically link device photos of receipts to expense entries that ow to DT Practice and let rm members and/or administrators view receipts directly from time and expense entry.
- Call Timer - Time outgoing calls and use the dialed number to create a time entry.

COMPREHENSIVE TRAINING AND CONSULTING OPTIONS

MAKE THE MOST OF YOUR SOFTWARE INVESTMENT AND MAXIMIZE FIRM PRODUCTIVITY

The DT Professional Suite offers a selection of services that can help you get more out of your software investment, including :

STANDARD TRAINING

Our web training is a great way to bring new staff up to speed or enable experienced staff to revisit speci c topics, and/or supplement custom training or consulting. Our web training consists of live training taught by our professional instructors and delivered to your of ce via the web.

CUSTOM TRAINING

To ensure that you receive the appropriate training solution for your rm, we offer affordable custom