



## Solutions

### In This Issue

Page 2

#### Viewpoint

Leverage client information with new Data Exchange module.

Page 3

#### Software Idea File

Users share their experience with Practice CS dashboards and making money on write-up.

Page 4

#### Software in Action

Financial Analysis CS gives Alabama CPA Terry Rogers a leg up.

Page 8

#### Newsline

Early registration discounts still available for the 2006 Users' Conference, look for new Microsoft OS in 2007, and more.

Page 10

#### Cover Story

Florida accountant Sonya Laney gets 24/7 access for herself and her clients with Virtual Office CS.

Page 13

#### Tips & Tactics

Printing a list of returns on extension in UltraTax CS and other tips.

**COVER:** As a sole practitioner, Sonya Laney benefits from the 24/7 access and data backup that Virtual Office CS provides. (Photos by David Wolff.)

Solutions is published by The Thomson Corporation and Creative Solutions, 7322 Newman Boulevard, Dexter, MI 48130; (800) 607.5100. Printed in the United States. Copyright 2006 Creative Solutions. Vol. 4, No. 2.

## Powerful New Benchmarking Data Exchange Promises to Transform Client Service

**T**hompson Creative Solutions is continuously looking for new ways to help our customers improve efficiency and increase profits. From software integration to quality customer service and beyond, we want your firm—and your clients' businesses—to succeed.

One of our current goals is to help our customers leverage client information within the broader accounting community in order to enhance services and provide valuable insight to clients. It's with this goal in mind that we've created a powerful new product, the Data Exchange module, which is available exclusively within Financial Analysis CS. The data within this module is unique and comes from trusted sources—your peer accounting firms that also use Financial Analysis CS.

Starting this fall, Financial Analysis CS users will be able to contribute their client data—stripped of any client-specific information—to the Data Exchange module. And you can be assured that all data resides in a secure environment. Users that contribute data will automatically have access to the entire database and will be able to drill down to retrieve specific criteria, such as type of business, sample size, state,

region, number of employees, and custom ranges of assets or sales. The Data Exchange module will enable you to offer your clients valuable financial advice based on customized benchmarks.

The Data Exchange module will initially be offered to Financial Analysis CS users as part of the RMA® license. Data offered within this new module is not meant to be a replacement to RMA data, but rather, it was created to offer another level of data that can be shared with your clients.

Throughout the year, as data contributions increase, the Data Exchange module will progressively become an even more powerful benchmarking tool. This new module will transform the types of reports and level of service you provide to your clients.

Thomson Creative Solutions is committed to providing you with the necessary tools to remain competitive in an increasingly high-tech world. As always, we hope you think of us as your technology partner, ready and willing to provide assistance and offer solutions that will continue to enhance the client-accountant relationship.

**“Starting this fall, Financial Analysis CS users will be able to contribute their client data—stripped of any client-specific information—to the Data Exchange module.”**

Jonathan A. Baron

Executive Vice President and General Manager—Professional Software and Services, Thomson Tax and Accounting  
President and CEO - Thomson Creative Solutions