

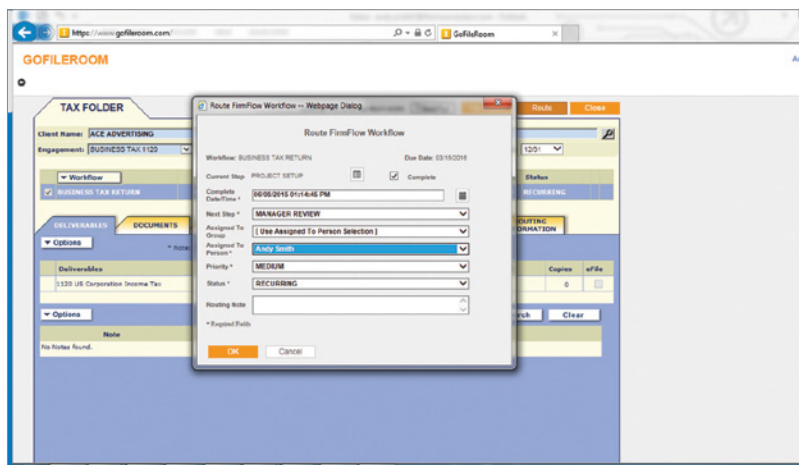
# PRODUCT PROFILE

# FIRMFLOW

CS PROFESSIONAL SUITE®

## Paperless Workflow Management

Thomson Reuters® FirmFlow is a cloud-based workflow software that standardizes business process for full service tax and accounting firms with advanced routing functionality, real-time tracking, custom reporting features, and more. FirmFlow helps automate all your business processes including tax, audit, consulting, financial services, litigation support, and others to streamline both client and non-client engagements.



### Convenient routing

Once you are ready to route an assignment to the next person, simply click the Route button.

## Maximum organization

As digital and automated business workflows increase, so does the need for a single, centralized solution to manage all of your clients and processes across your firm. With FirmFlow, you can:

- **Work from a familiar interface** and in virtual folders based on the type of engagement. Once created, folders and client information can be rolled forward each year.
- **Standardize all business processes** to ensure consistency and compliance throughout the firm.
- **Increase productivity** by eliminating the physical movement of work with electronically routed and tracked files.
- **Improve staff collaboration** within a single or multi-office firm through shared files and effective communication using categorized notes.
- **Access personalized real-time reporting** and status of client engagements so you never miss a deadline.

## Maximum organization (continued)

- **Filter the list of workflows** to show future workflow-step routing assignments.
- **View the workflow deliverables history;** add, modify, extend or delete deliverables; and modify information field values when a workflow is complete.
- **Take advantage of integration** with your existing client database, as well Thomson Reuters® GoFileRoom, Thomson Reuters® GoSystemTax, SurePrep, and Microsoft® Office to digitally manage documents and client files.
- **Connect documents** to your workflow and access them directly from that specific workflow.
- **Customize project processes** to adjust project management based on the type of engagement.
- **Use sophisticated rollover capabilities** to determine which information should roll over from year to year.
- **Personalize your interface** to allow prioritized tabs and fields to be displayed, such as the My Work screen.
- **Access important data quickly,** such as recently added documents or your assigned workflows, on the updated home page.
- **Take advantage of Workflow Intelligence** features like customized alerts and notifications.
- **Run custom reports** to show work assigned to specific users, including inactive users.

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## Paperless Workflow Management

### Rules and notifications

FirmFlow allows you to set notifications and alerts so you never miss a deadline. And it gives you access to the real-time data that lets you make meaningful and timely management decisions. You can:

- **Receive routing notifications** when work has been assigned to you in the workflow process.
- **Use the built-in due date monitoring** capabilities so you stay on top of your schedule. Set automatic notifications and never miss a deadline.
- **Manage client engagements** to make sure you have the right staff working on the right tasks, and quickly adjust workloads and route changes as needed.
- **Manage staff workflow** using direct assignments or staff pooling and notify staff of changes.
- **Track and resolve open items** within an engagement.

## The Value of an Online Solution

### Convenient and cost-effective

When you work in the cloud, you know your data is always there when you need it, 24/7. Working online is more cost-effective, saving you countless hours of maintaining your own internal system and giving you maximum productivity with minimal IT investment, including:

- **Lower cost of ownership** — Reduce your investment in hardware purchases, maintenance, and additional IT staff.
- **Rapid deployment** — We take care of all installations and upgrades, so you are always using the most updated version.
- **More growth flexibility** — Grow your business without the risks, costs, and administrative responsibilities associated with developing and maintaining the required infrastructure.
- **Connectivity** — FirmFlow has the ability to connect to different business analytics tools and gains insight on your FirmFlow data.

## Assured Security

### Safeguard against lost data

In the event of fire, theft, or natural disaster, your data will remain safe and secure, residing in two redundant state-of-the-art data centers. The system uses advanced network and data center security technologies to protect all your documents and data. Access is controlled with username and password authentication and 128-bit SSL encryption. And all user sessions are tracked — providing a complete audit trail.

FirmFlow ensures a level of continuity, availability, backup, and disaster recovery not available with an in-house system.

### A variety of security options

FirmFlow offers multiple layers of security, including features that protect emailed documents, allowing only the intended recipients to open and view them.

With FirmFlow, you can:

- **Easily configure access and security privileges** for every user via the system's administration module.
- **Prevent unauthorized access** and restrict back-door access that inherently exists with in-house systems.
- **Maintain user accounts, passwords, and related expiration dates** via an advanced user administration module.
- **Protect emailed documents** by using the on-the-fly PDF Passwords feature, so only intended recipients can open and view.

**Learn more** — Our expert staff is passionate about bringing you products that make your job easier and more profitable. Call us at +1 800 968 8900, or email us at [CS.Sales@ThomsonReuters.com](mailto:CS.Sales@ThomsonReuters.com) and we'll be happy to answer your questions.

## Training and Consulting Make the most of your software investment

The CS Professional Suite® offers an extensive selection of services to help you get more out of your software investment. Whether you're looking for specific training for your staff, a quick refresher course, help with full-scale implementation, or assistance with your business processes, we've got you covered. Learn more at [Tax.ThomsonReuters.com/CSTrainingConsulting](https://Tax.ThomsonReuters.com/CSTrainingConsulting).

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