

When: Thursday, September 29 - 8:30am to 12:30pm
Where: Denver Marriott Tech Center, 4900 S Syracuse St., Denver, CO
Presentation: Lecture / Seated Classroom format, Projection & Overhead
Audience: PASBA members and their staff. Wide ranging audience of Bookkeepers, Managers, Owners
TR Presenters: Anthony Francetic, Louie Calvin

Topic: **Moving Your Firm Forward with Accounting CS**
Level: New, Basic, Advanced

Description:

Despite ever-changing technology, some things haven't changed—the need to simplify your workflow and provide high-value services to your clients. Join us to hear Louie Calvin, accounting and payroll product manager for Thomson Reuters, and seasoned consultant, Anthony Francetic, discuss how working in the cloud is expediting the traditional processing of an accounting firm.

They'll share how your firm can centralize write-up—See the big picture view of your firm and the status of your work for smoother operations. Also reap Cloud-based benefits—Automate data collection and avoid process inefficiencies through online client accounting—such as cloud-based bookkeeping systems, client portals and other key collaboration tools.

We'll focus on the basics of Accounting CS and Accounting CS payroll in this workshop, and you'll learn processes and workflow options to help make your firm more efficient and reduce the time spent on each client. You'll leave feeling comfortable with new client setup and navigation through the software.

Upon completion, you'll be able to:

- Navigate the program
- Design the Accounting CS database with new client setup items
- View and modify the trial balance
- Work with QuickBooks data

Accounting CS Client Access

- Understanding the benefits of a real-time, secure client accounting system.
- Pricing, marketing to client, change management
- Setup required to deliver Accounting CS Client Access to your clients. You'll become familiar with the critical steps needed in Accounting CS and NetClient CS.

Accounting CS Payroll

- Payroll Onboarding and Setup Process
- Review and process payroll tax forms using a task-based, batch processing approach
- How to effectively connect your payroll services to client and employee portals