

FACT SHEET

DT PRACTICE® PROJECT MANAGEMENT MODULE

DT PROFESSIONAL SUITE®

A PRACTICE MANAGEMENT SYSTEM THAT HELPS YOU MANAGE YOUR PRACTICE

A leader among professional practice management systems, DT Practice offers a revolutionary digital dashboard approach that displays critical, real-time information about your staff, clients, and firm. Serving as a workflow hub, DT Practice combines all of the tools and resources you need in one place to ensure that you're in complete control and managing your practice efficiently and effectively.

MANAGE YOUR DAY FROM START TO END



One of the most powerful workflow tools within DT Practice is the Project Management add-on module. This easy-to-use, comprehensive project management system lets you manage and track your firm's projects and tasks right from your own desktop—giving you unprecedented control over the workflow in your office.

GIVE YOUR STAFF THE TOOLS THEY NEED

With the Project Management module, your staff can manage their own responsibilities with the ability to:

- Identify the tasks and time required to perform work.
- Track due dates.
- Control project workflow.
- Monitor staff performance.
- Manage progress for all your firm's projects.
- Integrate with the Staff Management module for complete scheduling capabilities.

ADD EFFICIENCY TO MANAGE EVERY PROJECT WITH EASE

The Project Management module helps you and your staff at every turn with the ability to:

- Save time with project templates that hold default information for project creation.
- Set up notifications to inform staff members when client information for a project has been received, assignment changes are made, or important dates have been updated.
- Control how recurring projects are generated with flexible project generation.
- Create user-defined recurrences for recurring projects and set them to expire after a specified number of occurrences or on a specific date.
- Manage project responsibilities from the Staff Dashboard by viewing assigned projects and tasks.
- View Microsoft® Outlook® appointments, tasks, and projects in an Outlook calendar-style interface.
- Launch applications needed to complete projects from within DT Practice.
- Click a project to have your work timed automatically and seamlessly integrated.



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#	Client ID	Client Description	Parent Client	Project	Project Description	Engagement	Responsible
489	BINGS	Bing, Sally	BINGTA	1040SIMPLE	Individual Income T	INDIVTAX	Miller, Steve
490	HANNA	Hanna, Jason	HANNA	1040SIMPLE	Individual Income T	INDIVTAX	Rogers, Melissa
491	JONESRJ	Jones, Ron & Jenn	JONESRJ	1040SIMPLE	Individual Income T	INDIVTAX	Rogers, Melissa
492	WILSON	Wilson, Dan & Joa	WILSON	1040SIMPLE	Individual Income T	INDIVTAX	Turner, Cindy
509	ABCP	ABC Partnership	ABCP	1065	Partnership Tax Ret	BUSINESSTAX	Miller, Steve
510	ACEADVERT	Ace Advertising	ACEADVERT	1120	Corporate Tax Retu	BUSINESSTAX	Rogers, Melissa
511	ALPHA	Alpha Promotions	ALPHA	1065	Partnership Tax Ret	BUSINESSTAX	Rogers, Melissa
512	ANIMAL	Animal Shelter 101	ANIMAL	1041	Estate and Trust Ta	BUSINESSTAX	Turner, Cindy
519	ANDERSON	Anderson, Joe & K	ANDERSON	1040	Individual Income T	INDIVTAX	Rogers, Melissa
520	BENTON	Benton, Stephanie	BENTON	1040	Individual Income T	INDIVTAX	Miller, Steve
521	BINGTA	Bing, Ted & Angel	BINGTA	1040	Individual Income T	INDIVTAX	Miller, Steve
522	BROWNJ	Brown, Gerald & Eli	BROWNJ	1040	Individual Income T	INDIVTAX	Miller, Steve
524	GOLDEN	Golden, Michael &	GOLDEN	1040	Individual Income T	INDIVTAX	Rogers, Melissa
525	QUINN	Quinn, Brian & Mic	QUINN	1040	Individual Income T	INDIVTAX	Rogers, Melissa
526	SMITH	Smith, Tom & Kath	SMITH	1040	Individual Income T	INDIVTAX	Turner, Cindy
527	CRAWFORD	Crawford's Steak	CRAWFORD	1040	Individual Income T	INDIVTAX	Turner, Cindy
539	AAC	Advanced Advertis	AAC	1120S	S Corporate Tax Re	BUSINESSTAX	Miller, Steve

Order	Description	Activity	Assigned	In Work Queue	Staff Qualifications	Target Start	Target Complete	Notes
2	Information In/Sc	INFOINSCAN	Rogers, Melissa			2014-03-05	2014-03-05	Nc
3	Preparation	PREPARATION	Turner, Cindy		Ind Tax Prep Novice	2014-03-06	2014-03-10	Nc
4	Review	REVIEW	Wilson, Jeff		Ind Tax Review Nov	2014-03-11	2014-03-12	Nc
5	Clear Review Co	CLEARREVIEW	Turner, Cindy			2014-03-13	2014-03-14	Nc



THE MANAGE PROJECTS SCREEN

Gives you control over the workflow of your entire firm.

ADD EFFICIENCY TO MANAGE EVERY PROJECT WITH EASE

(continued)

- Track budget vs. actual information to determine how your staff is progressing on a project.
- Make adjustments to the current project's budget without affecting the budget of future projects.
- Use the Manage Projects screen to update project and task information, assign work, and review your own workload.
- Assign multiple people to projects and tasks.
- Enter time and expenses by project.
- Bill clients based on projects.

AVAILABLE PROJECT MANAGEMENT REPORTS

- List of Project Templates
- Project Listing
- Project Budget to Actual
- Project Tracking
- Routing Sheet
- Task Budget to Actual
- Task Tracking

The Project Management Module can help you track your firm projects and tasks from one location, keeping you fully informed and offering complete control over your workflow.

LEARN MORE — For more information about the DT Practice Project Management Module, contact us at 1 866 653-8629 or email dt.sales@thomsonreuters.com.

