PRACTICE CS

Client Management WalkThrough

version 2014.x.x

TL 27716a (1/16/15)

Contents

Introduction

This walkthrough introduces you to the process of managing your clients using the Client Management module in Practice CS. After you have completed the walkthrough, you will have a good understanding of the advantages this module provides in managing relationships with your clients.

Note: This walkthrough assumes you are familiar with using Practice CS or that you have read chapter 3, Program Overview, in the *Practice CS Getting Started* guide.

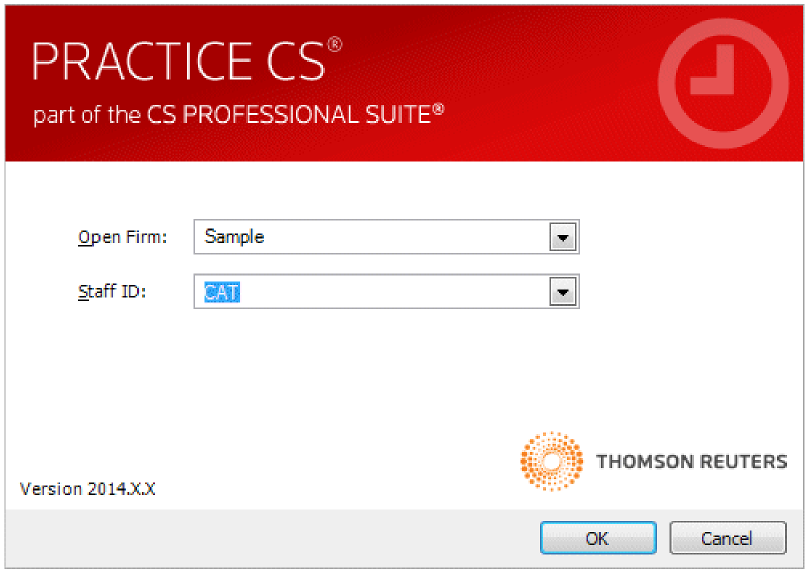
Opening the sample database

To perform the exercises in this walkthrough, you will start Practice CS and log in to the Sample database as staff CAT. To log in, follow these steps.

1. Start Practice CS.
2. In the login dialog, select Sample in the *Open Firm* field.
3. In the *Staff ID* field, select CAT.

   Note: If you previously marked the *Remember login information* checkbox, hold down the SHIFT key when you double-click the Practice CS icon and continue to hold down the SHIFT key until the login dialog appears.

4. Click OK.



Backing up the sample database

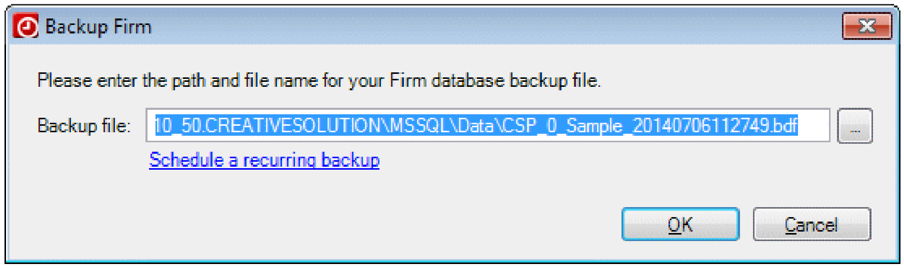
Data that you enter while performing the exercises in this walkthrough will affect the Sample database. Therefore, we recommend that you make a backup of the Sample database before you begin so that it is available for use in other Practice CS walkthroughs.

Note: If you are running Practice CS through Virtual Office CS,™ the Backup menu command is not available. We recommend that you install a local copy of Practice CS so that you can back up the Sample database. For instructions on installing the program, please see chapter 2, Installation Instructions, in the *Practice CS Getting Started* guide.

To back up the Sample database, follow these steps.

1. In Practice CS, choose File > Backup.

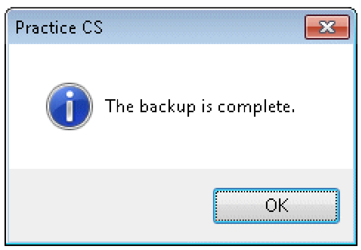
2. Click the browse ... button next to the *Backup file* field and if necessary, navigate to the folder where you want to save the backup file. The backup file will have a file extension of BDF.



Note: The backup file will be created on the computer where the data resides. The path specified here must be a valid path on that computer.

3. Click OK.

4. When prompted that the backup is complete, click OK.



Notes

- After you complete this walkthrough, you can restore the sample database. For instructions, see "Restoring the sample database" on page 32.
- If the data in your Sample database does not match what you see in this guide, you may need to restore a new copy of the Sample database. Copy the Sample.bdf file from the Data subfolder of your X:\Practice CS 2014.x.x Download folder (where X: is the location to which your firm downloaded the installation files) to a location on your database server. Then follow the instructions for restoring the sample database on page 32.

Walkthrough Exercises

The Client Management module of Practice CS helps you manage your firm's relationships with clients, business affiliates, and contacts by tracking interactions such as phone calls and messages. The following exercises will illustrate how to use the features of the Client Management module to better manage your business relationships.

Setting up client management information

Before you begin using the features of the Client Management module, you should set up client retention descriptions to help keep track of clients and prospects that your firm wins and loses. This information is then tracked on the Main tab of the Clients setup screen.

Setting up client retention descriptions

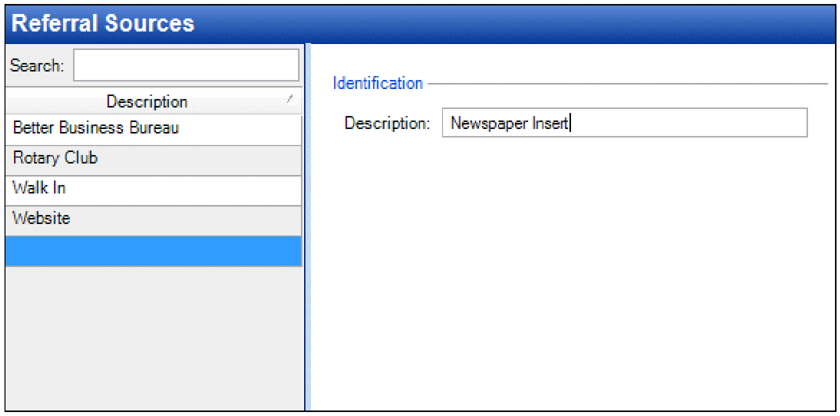
The retention information you enter is used to populate the fields in the Client retention information section of the Clients setup screen (Main tab). There are separate setup screens for Referral Sources, reasons a client was won (Won Reasons), reasons a client was lost (Lost Reasons), and to whom a client was lost (Lost To).

Referral sources

Referral sources enable you to keep track of referrals to your firm from various sources, such as a specific advertising campaign. By entering this information, your firm can track information about your referrals, such as revenue generated from a referral source. You can print most Practice CS reports grouped or filtered by Referral Source, revealing the impact of your firm's various referral sources.

1. Choose Setup > Client Retention Descriptions > Referral Sources.
2. In the Referral Sources screen, click the Add button.

3. Enter **Newspaper Insert** in the *Description* field.

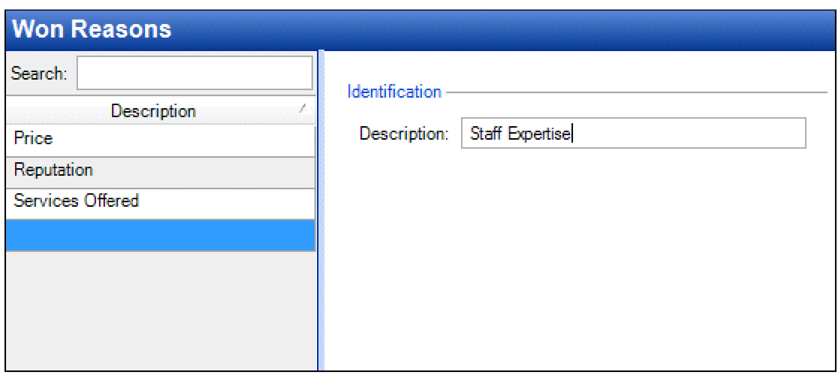


4. Click the Enter button to save the new item.

Won reasons

Won reasons enable your firm to track the reasons you win clients, so you can focus on these factors in your advertising or when meeting with prospective clients.

1. Choose Setup > Client Retention Descriptions > Won Reasons.
2. Click the Add button.
3. Enter **Staff Expertise** in the *Description* field.



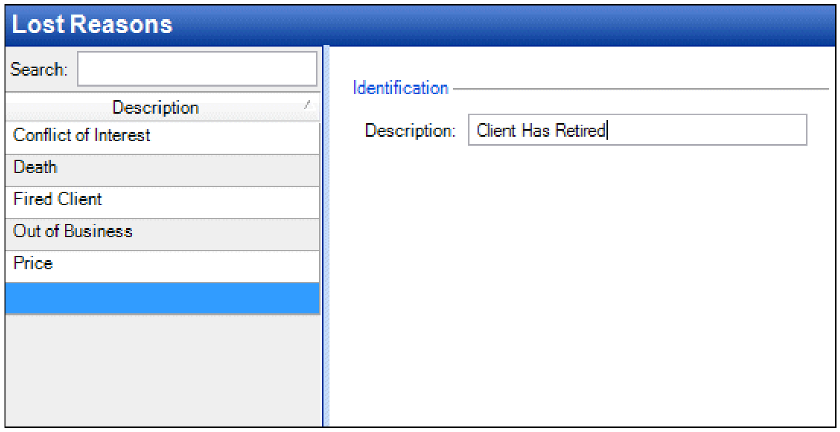
4. Click Enter.

Lost reasons

Lost reasons enable your firm to track why prospective clients choose to go elsewhere, and help identify ways in which your firm can improve its ability to attract and retain clients.

1. Choose Setup > Client Retention Descriptions > Lost Reasons.
2. Click the Add button.

3. Enter **Client Has Retired** in the *Description* field.

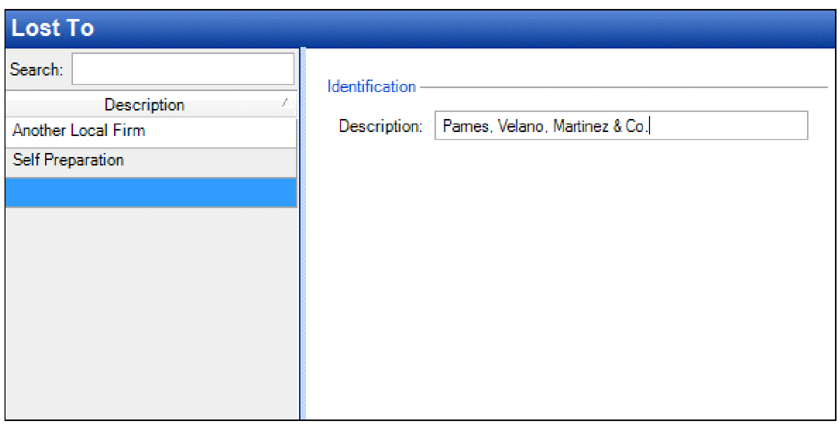


4. Click Enter.

Lost to

By tracking who your firm loses prospective clients to — for example, competing firms or even online tax software — you can strategize ways to make your firm more competitive.

1. Choose Setup > Client Retention Descriptions > Lost To.
2. Click the Add button.
3. Enter **Parnes, Velano, Martinez & Co.** in the *Description* field.

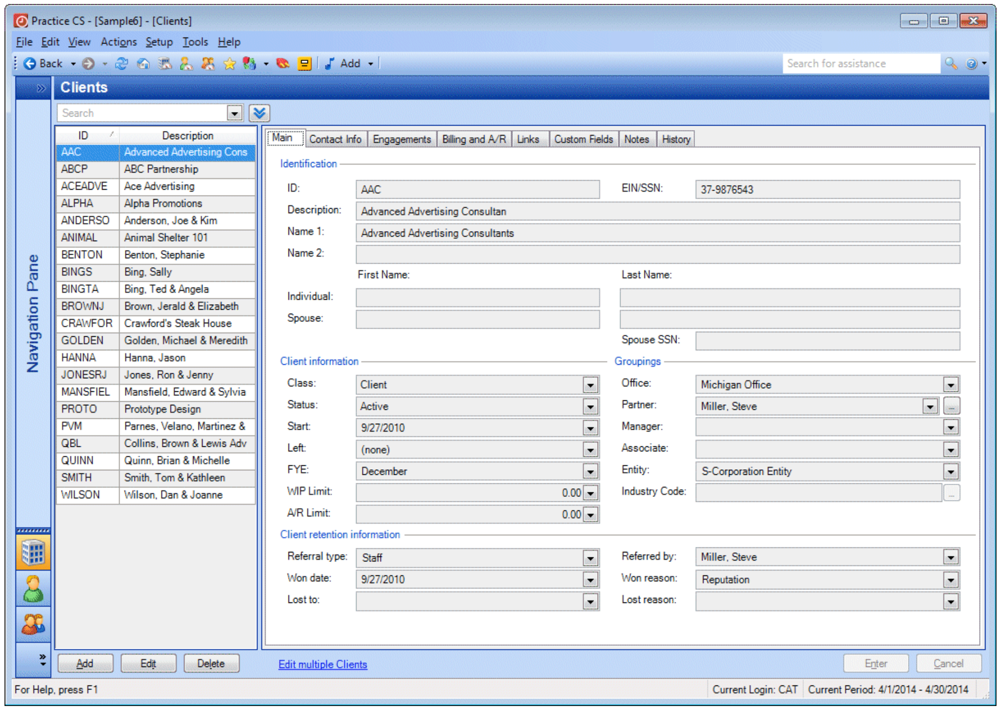


4. Click Enter.

Entering retention information

Once you have set up client retention descriptions, you can begin to enter retention information for your clients and prospective clients.

▸ Choose Setup > Clients, and click the Main tab.



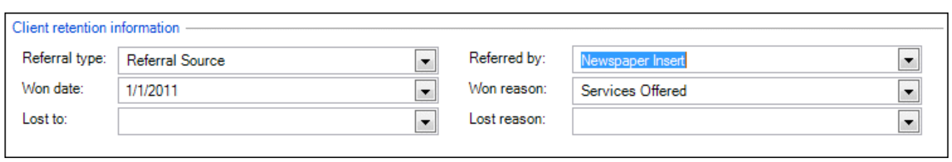
Referral type and Referred by fields

The *Referral type* field enables you to indicate whether the referral was made by a Client, Contact, Referral Source, or a member of your Staff.

If you select Client, Contact, or Staff, the *Referred by* field provides the relevant list from which to select a specific referral source. For example, if you select Staff in the *Referral type* field, your choices in the *Referred by* field will consist of a list of staff at your firm.

If you select Referral Source, the *Referred by* field enables you to choose one of the referral sources entered in the Referral Sources setup screen.

1. In the Clients list, select client BENTON (Benton, Stephanie).
2. Click the Edit button.
3. In the *Referred by* field, select Newspaper Insert from the drop-down list.

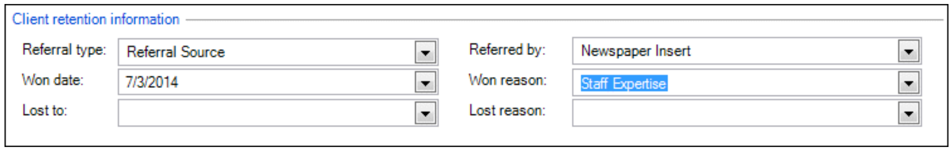


Won date and Won reason fields

The *Won date* field enables you to track the date that a prospect became a client. The *Won reason* field provides a list of reasons entered in the Won Reasons setup screen.

1. In the *Won date* field, enter today's date.

2. In the *Won reason* field, select Staff Expertise.



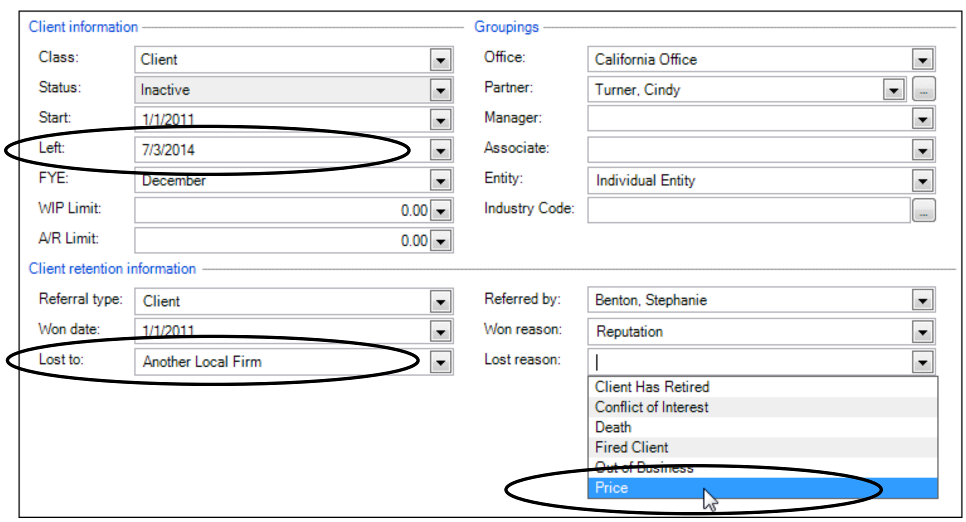
3. Click Enter.

Lost to and Lost reason fields

Ideally, you would never have to use the *Lost to* and *Lost reason* fields, but you can use them to track the reasons clients choose to go elsewhere and to analyze ways to improve client retention.

The lists in these fields are populated by the entries you made in the Lost To and Lost Reasons setup screens. You may also want to enter a date in the *Left* field in the Client information section of the screen.

1. In the Clients list, select client WILSON (Wilson, Dan & Joanne).
2. Click the Edit button.
3. In the *Left* field, enter today's date.
4. In the *Lost to* field, select Another Local Firm. When asked if you want to inactivate the client, click Yes.
5. In the *Lost reason* field, select Price. Notice that Client Has Retired, which you entered earlier, also appears in the list.



6. Click Enter to save your changes.

Note: For most of the fields in this section, you can add additional items to the field list on the fly by right-clicking in the field and choosing the context menu command to add a new item.

Using the Manage Clients screen

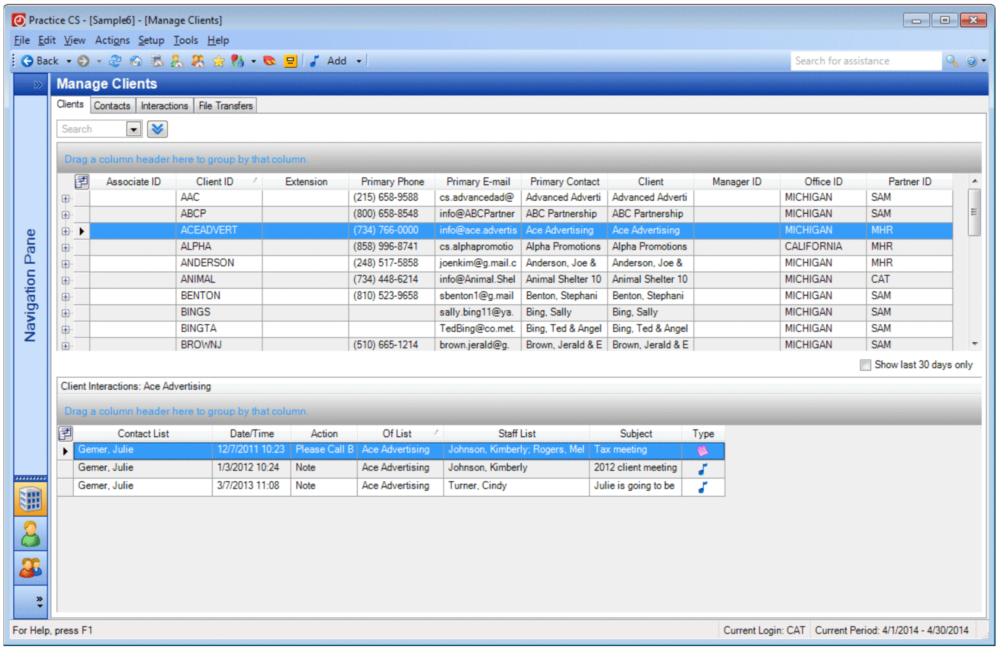
The Client Management module enables you to track a variety of interactions in Practice CS. These interactions are phone calls, phone messages, miscellaneous notes, and email messages related to your firm's clients, contacts, and prospects. You can enter interactions as they happen or at any time afterwards, providing as much detail as necessary. For example, you can add a phone message for another staff member, who will then be able to see the message in Practice CS.

The Manage Clients screen is a single location where you can add, view, edit, delete, search, and filter all of your clients and contacts as well as the interactions your firm has with those clients and contacts. Client and contact information is displayed along with relevant interactions, such as phone and email messages, which can help any staff member to quickly "get up to speed" on a particular client's situation. All interactions are displayed, providing access to all client-related activity in one place.

You can right-click in this screen to add or edit contact information, or to add new interactions.

Note: The name of this screen and of the various interactions are firm terminology variables. Your firm might use different terms for some or all of these items. To view the default terms for these items, choose Help > Enable Default Terminology.

- To open the Manage Clients screen, choose Actions > Manage Clients.



Clients tab

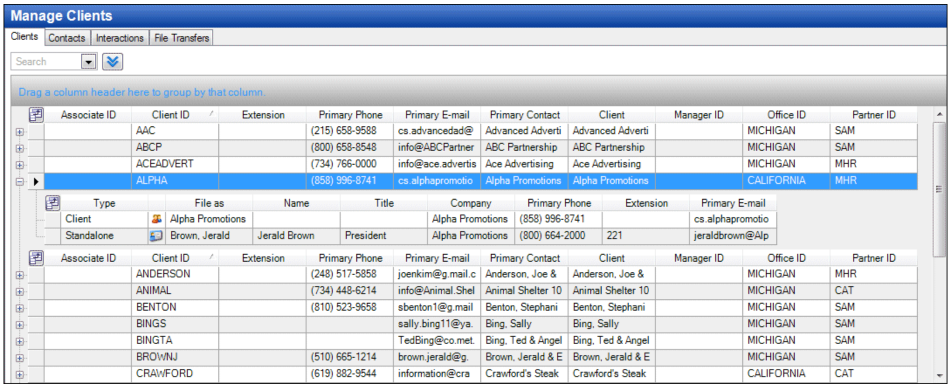
The Clients tab provides a client list with easy access to contact information, along with a separate list of interactions with the selected client. You can sort the list by clicking any of the column headings, or drag a column heading to the grouping area to group the list by that column. You can also click the field chooser button and select columns to view in the grid.

In this example, we will add an additional contact for a client from the Clients tab.

1. Click the Clients tab.

2. If necessary, clear any filters by clicking the remove filter button in the *Filter* field.

3. Scroll down the client list and click the expand button next to client ALPHA (Alpha Promotions). The client row expands to show all contacts for the client.



4. Right-click one of the existing contacts for the client and choose Add Contact from the context menu.

5. In the Contact dialog, enter the following information.

Field	**Entry**
Name	**Randy Schiff**
Company	**Alpha Promotions**
Salutation	**Mr.**
File as	**Schiff, Randy**
Business phone	**(734) 333-8793**
Fax	**(734) 333-8792**
Business address	**8842 E. Cross St.**
City	**Ypsilanti**
State	**MI**
Zip	**48197**
County	**Washtenaw**
Country	**USA**
E-mail	**randy@alphapromotions.com**
Website	**www.alphapromotions.com**
Categories	**Quarterly Tax Newsletter, Holiday Card**

6. Click OK to save the new contact.

Notes

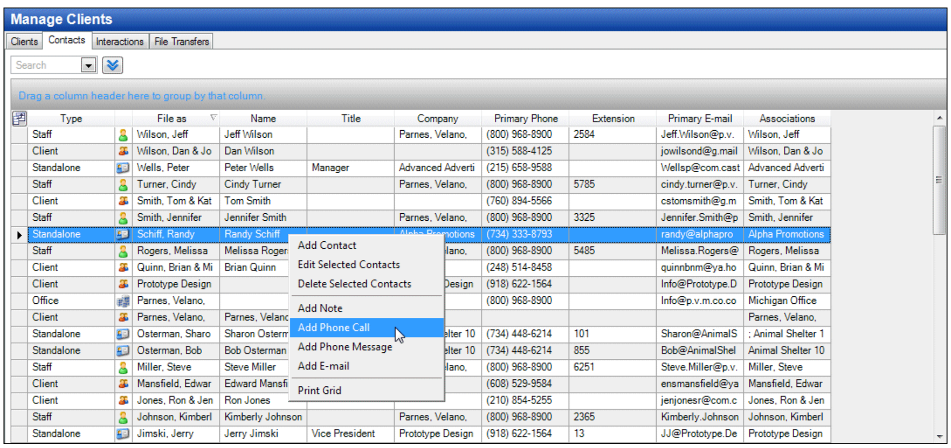
- You can filter the client list using the *Filter* field at the top of the screen. The Interactions tab section on page 14 shows an example of filtering.
- You can enter up to three email addresses per contact. The address designated as Primary will appear on the Manage Clients screen.

Contacts tab

The Contacts tab provides a list of all of your contacts, which can be sorted by clicking any of the column headings, or grouped by dragging column headings to the grouping area above the list. You can also click the field chooser button and select columns to view in the grid. At the bottom of the screen is a list of interactions with the selected contact.

Adding an interaction for a contact

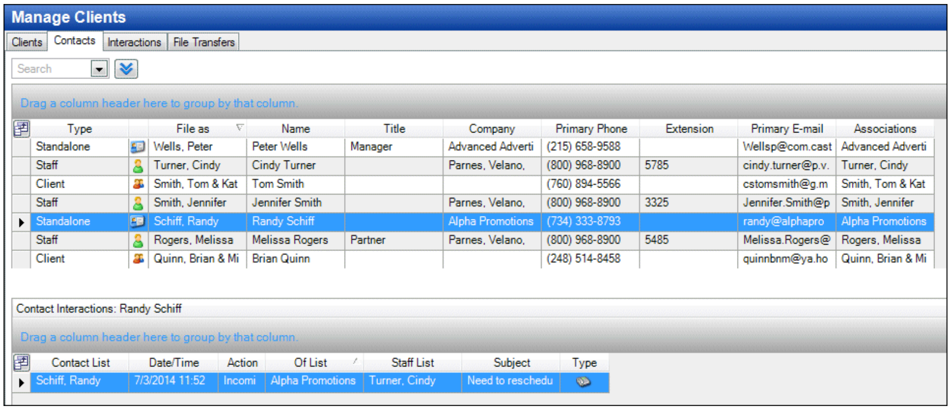
1. Click the Contacts tab.
2. Click the File as column heading to sort the column in descending alphabetical order.
3. Right-click the row for Randy Schiff and choose Add Phone Call from the context menu.



4. In the Phone Call dialog, fill in the following information. Notice that some information has been filled in automatically.

Field	**Entry**
Importance	**High**
Subject	**Need to reschedule**
Phone Call	**Randy needs to reschedule appointment next week.**

5. Click OK to save the phone call entry. Notice that the interaction you just entered for Randy Schiff now appears at the bottom of the screen, under Contact Interactions.



Adding a standalone contact

Not all of your firm's contacts are clients. Some contacts are business affiliates who are not associated with any client, or who may be associated with multiple clients, such as an attorney.

1. Right-click in the list of contacts and choose Add Contact from the context menu.

2. In the Contact dialog, enter the following information.

Field	Entry
Name	**John Belson**
Title	**Vice President**
Company	**Acme Bank**
Salutation	**Mr.**
File as	**Belson, John**
Business phone	**(734) 334-4424**
Fax	**(734) 334-4421**
Business address	**8277 N Prospect St.**
City	**Ypsilanti**
State	**MI**
Zip	**48197**
County	**Washtenaw**
Country	**USA**
E-mail	**jbels@acmebank.com**
Website	**www.AcmeBank.com**

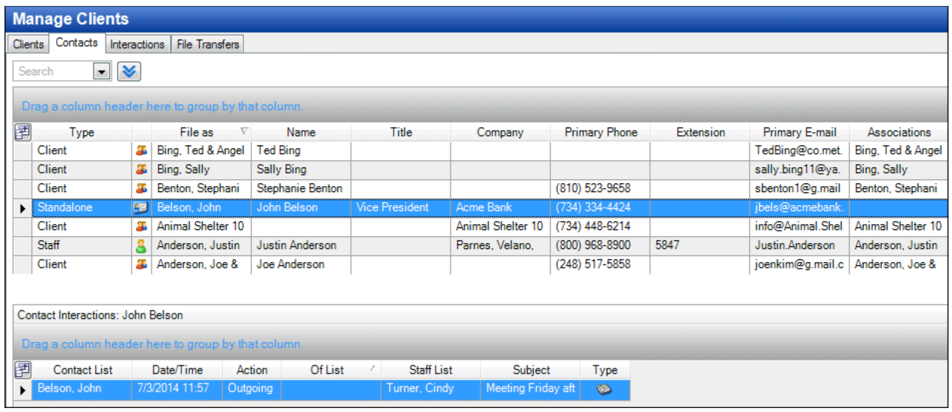
3. Click OK to save the new contact.

4. To add an interaction for this standalone contact, right-click John Belson in the list of contacts and choose Add Phone Call from the context menu.

5. In the Phone Call dialog, enter the following information.

Field	**Entry**
Call type	**Outgoing**
Subject	**Meeting Friday afternoon**
Phone Call	**Set up meeting Friday at 4 PM, John's office.**

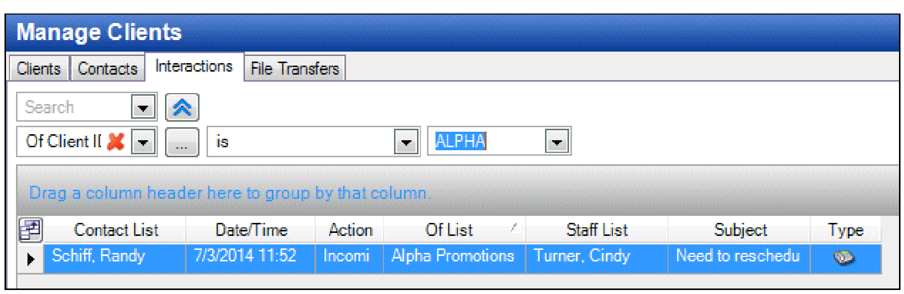
6. Click OK to save the phone call entry.
7. The interaction you entered for John Belson will appear at the bottom of the screen.



Interactions tab

The interactions tab provides a list of all of your firm's interactions with clients, contacts, or others, which can be sorted by clicking any of the column headings, or grouped by dragging column headings to the grouping area above the list. As with the other tabs on this screen, you can filter the list of interactions. For example, you may want to limit the list only to interactions for the client Alpha Promotions.

1. Click the Interactions tab.
2. Click the show filter  button to display the *Filter* field.
3. In the *Filter* field, select Of Client ID from the drop-down list.
4. In the *Method* field, select is.
5. In the next field, select client ALPHA from the drop-down list.
6. Now only the interactions for client ALPHA appear.



Note: On the Clients, Contacts, and Interactions tabs you can right-click an item to add a new interaction for that contact. Practice CS will fill in the contact information automatically. For example, if you right-click client Sally Bing in the Clients tab and choose Add Phone Message from the context menu, the Phone Message dialog opens with Sally Bing's information already filled in, though you can edit the message as necessary. If you right-click without a client selected, no information is pre-filled for the interaction.

File Transfers tab

If your firm is also licensed for NetFirm CS,™ the Manage Clients screen also features a File Transfers tab.

File transfers enable your firm to send documents to contacts securely using NetClient CS® portals. You can also request files from contacts, and require contacts to sign documents electronically. For more information on file transfers, please see the topic File transfers overview in the Practice CS Help & How-To Center. From the Help menu, choose Help & How-To, and enter the keywords **file transfers** in the search field.

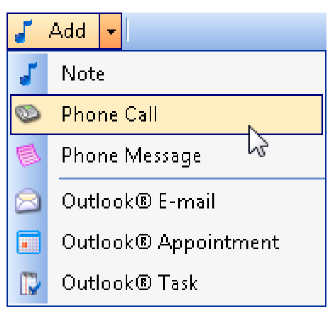
The File Transfers tab shows file transfer transactions, and can be filtered and restricted to showing only open transfers and/or items only from the past thirty days.

Add button

The Client Management module places an Add button on the Practice CS toolbar to enable you to quickly add interactions from anywhere in the program.

To add an interaction, follow these steps.

1. Click the small arrow on the right side of the Add button in the toolbar and choose the appropriate interaction type. For this exercise, choose Phone Call.



2. In the Phone Call dialog, enter the following data.

Field	Entry
With Contact	**Brown, Jerald**
Of	**Alpha Promotions**
Subject	**Rescheduling appointment**
Phone call	**Jerald suggests we meet on Thursday afternoon, any time after 2 PM (so wife Elizabeth can attend).**

Note: For all interactions, an entry is required in either the contact field (*With Contact*, *Regarding Contact*, or *From Contact*) or the *Of* field. Use both fields whenever appropriate.

3. Click OK to close the Phone Call dialog.
4. Using the Add button as in step 1, add the following interactions.

    a. Note

Field	**Entry**
Regarding Contact	**Brown, Jerald**
Of	**Alpha Promotions**
Subject	**Jerald's wife**
Note	**Name is Elizabeth; helps with bookkeeping.**

    b. Phone Message

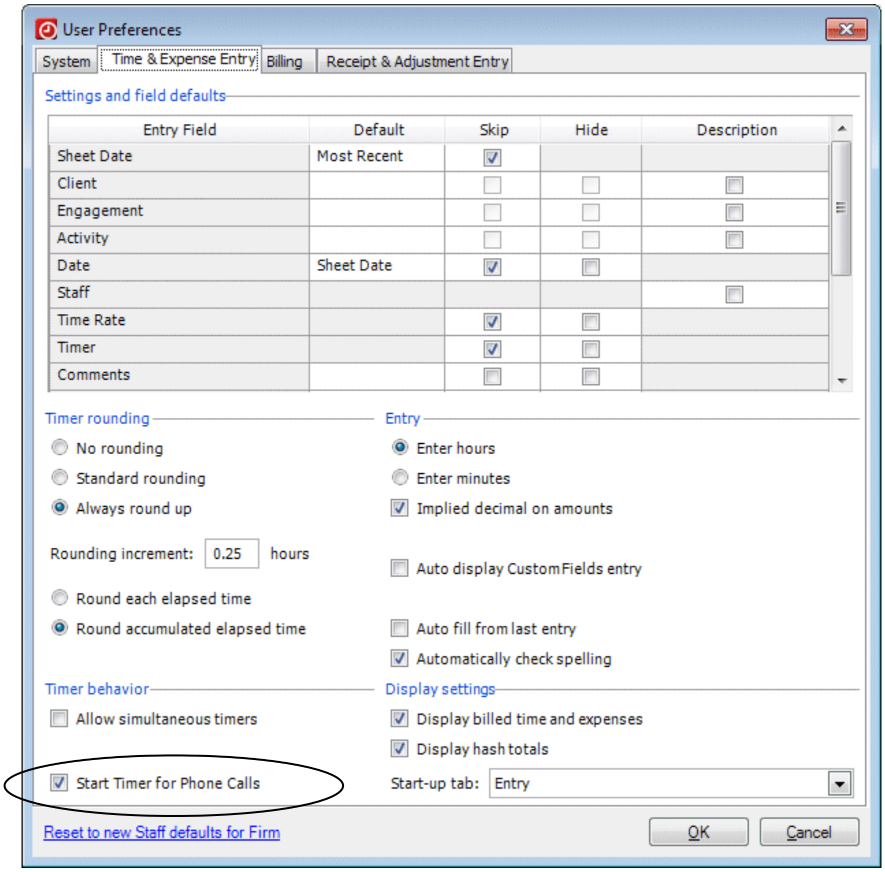
Field	**Entry**
Taken by	**Smith, Jennifer**
To	**Turner, Cindy**
From Contact	**Schiff, Randy**
Of	**Alpha Promotions**
Priority	**High**
Action	**Please Call Back**
Subject	**Thursday**
Phone call	**Can't make it on Thursday until 3 PM, is that OK?**

5. You can have Practice CS start a timer automatically for phone calls. Add one more interaction with an automatic timer to record the call as a time entry item.

    a. Choose Setup > User Preferences.

    b. In the User Preferences dialog, click the Time & Expense Entry tab.

c. Mark the *Start Timer for Phone Calls* checkbox.



d. Click OK to save your change and close the User Preferences dialog.

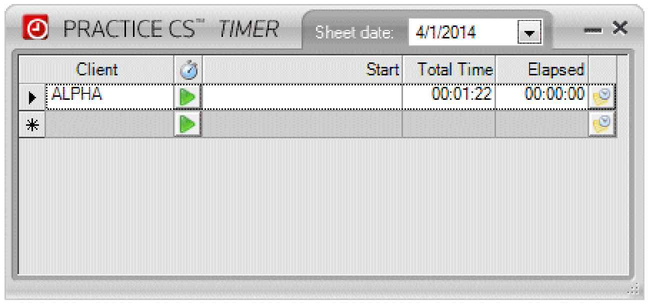
e. Add the following Phone Call interaction.

Field	**Entry**
With Contact	**Brown, Jerald**
Of	**Alpha Promotions**
Call type	**Outgoing**
Subject	**Thursday appointment**
Phone call	**Set meeting for Thursday at 3 PM.**

Notice that along with the Phone Call dialog, a timer opens with client ALPHA selected.

f. When the call concludes, click OK to close the Phone Call dialog. The timer stops automatically.

g. Click the maximize  button.



h. Click the post  button to create a time entry from the timer transaction. The Time & Expense Entry screen opens to the transaction from the timer.

i. For the purpose of this walkthrough, we will not complete this time entry transaction. Right-click the item in the Time & Expense Entry screen and choose Delete Entry from the context menu, and then close the timer.

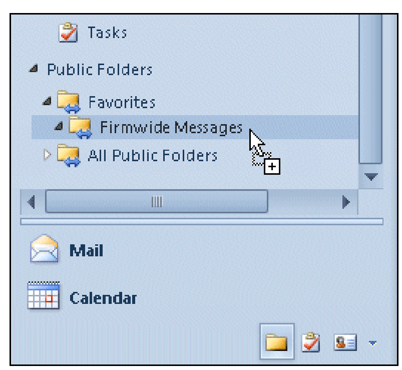
Notes

- When you add a new interaction from either the Clients setup screen or the Client Dashboard, client and primary contact information are filled in by default.
- You can add multiple interactions simultaneously, if necessary.
- You can add links to interactions, which enable you to associate files, folders, web pages, other interactions, FileCabinet CS documents, or GoFileRoom documents with interactions. Click the Links tab on any interaction dialog, then right-click and make a selection from the context menu.
- You can also add custom fields to interactions. Click the Custom Fields tab on any interaction dialog, right-click, and then use the context menu to add a custom field.

Email interactions

If you have set up a public folder in Microsoft® Outlook® for email messages in Practice CS, you can display emails to and from contacts as interactions. Only messages in the public folder will appear as interactions. For more information, see the topic Selecting a public Outlook folder for client email in the Practice CS Help & How-To Center.

Email messages must be in the designated public Outlook folder to display as interactions in Practice CS. To help automate this process, your firm may want to set up email rules in Outlook. You can manually store a copy of a message in a public folder by holding down the CTRL key and dragging the message to that folder.



Using interactions portlets

Practice CS dashboards offer portlets that display interactions information. The Interactions portlet on the Client Dashboard displays interactions for the selected client. On the Staff Dashboard, the Interactions portlet displays interactions for the staff member, and the Phone Messages portlet displays phone messages entered for the staff member.

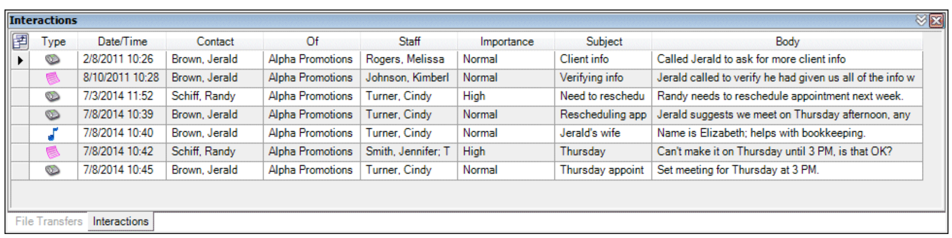
Client Dashboard

The Interactions portlet on the Client Dashboard displays interactions for the selected client.

1. Click the Client Dashboard button  on the toolbar.
2. At the top of the dashboard, select client ALPHA from the drop-down list.
3. Click the tab for the Interactions view and click the Interactions tab to view the portlet by that name.

Note: If necessary, add the Interactions portlet to the dashboard. Click the **Select Portlets** link, mark the *Interactions* checkbox, and then click OK. Resize or click and drag the Interactions portlet so that you can see all of the fields.

4. The portlet displays the interactions we entered previously for client ALPHA. (Your Date/Time column will show the dates on which you entered the interactions.) You can click any interaction to open it, or click the portlet title bar to open the Manage Clients screen to the Interactions tab.



Interactions

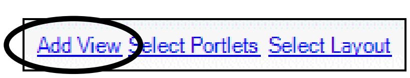
Type	Date/Time	Contact	Of	Staff	Importance	Subject	Body
	2/8/2011 10:26	Brown, Jerald	Alpha Promotions	Rogers, Melissa	Normal	Client info	Called Jerald to ask for more client info
	8/10/2011 10:28	Brown, Jerald	Alpha Promotions	Johnson, Kimberl	Normal	Verifying info	Jerald called to verify he had given us all of the info w
	7/3/2014 11:52	Schiff, Randy	Alpha Promotions	Turner, Cindy	High	Need to reschedu	Randy needs to reschedule appointment next week.
	7/8/2014 10:39	Brown, Jerald	Alpha Promotions	Turner, Cindy	Normal	Rescheduling app	Jerald suggests we meet on Thursday afternoon, any
	7/8/2014 10:40	Brown, Jerald	Alpha Promotions	Turner, Cindy	Normal	Jerald's wife	Name is Elizabeth; helps with bookkeeping.
	7/8/2014 10:42	Schiff, Randy	Alpha Promotions	Smith, Jennifer; T	High	Thursday	Can't make it on Thursday until 3 PM, is that OK?
	7/8/2014 10:45	Brown, Jerald	Alpha Promotions	Turner, Cindy	Normal	Thursday appoint	Set meeting for Thursday at 3 PM.

File Transfers Interactions

Staff Dashboard

The Staff Dashboard offers two portlets to show interactions information: the Interactions portlet and the Phone Messages portlet.

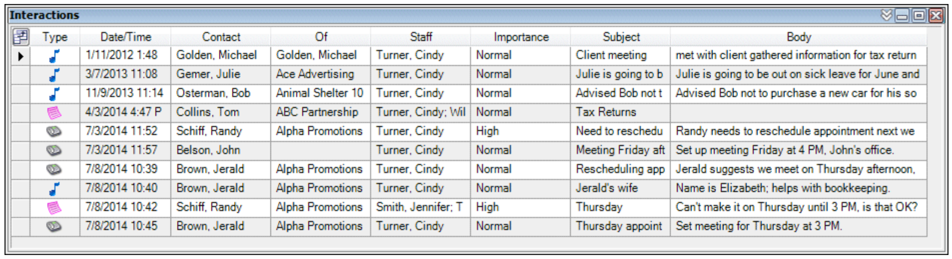
1. Click the Staff Dashboard button  on the toolbar.
2. On the Staff Dashboard, click the Add View link and add a view named Interactions.



3. Add the Interactions and Phone Messages portlets. Click the **Select Portlets** link, mark the checkboxes for those portlets, and then click OK.

4. Resize or click and drag the Interactions and Phone Messages portlets as necessary so that you can see them better.

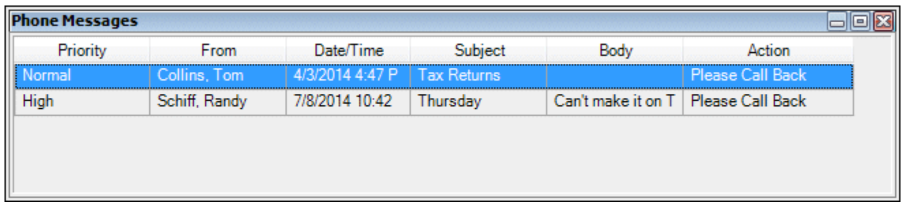
    - The Interactions portlet displays the interactions for staff member CAT (Cindy Turner) that you entered previously. You can click any interaction to open it, or click the portlet title bar to open the Interactions tab of the Manage Clients screen.



Interactions

Type	Date/Time	Contact	Of	Staff	Importance	Subject	Body
	1/11/2012 1:48	Golden, Michael	Golden, Michael	Turner, Cindy	Normal	Client meeting	met with client gathered information for tax return
	3/7/2013 11:08	Gemer, Julie	Ace Advertising	Turner, Cindy	Normal	Julie is going to b	Julie is going to be out on sick leave for June and
	11/9/2013 11:14	Osterman, Bob	Animal Shelter 10	Turner, Cindy	Normal	Advised Bob not t	Advised Bob not to purchase a new car for his so
	4/3/2014 4:47 P	Collins, Tom	ABC Partnership	Turner, Cindy; Wil	Normal	Tax Returns	
	7/3/2014 11:52	Schiff, Randy	Alpha Promotions	Turner, Cindy	High	Need to reschedu	Randy needs to reschedule appointment next we
	7/3/2014 11:57	Belson, John		Turner, Cindy	Normal	Meeting Friday aft	Set up meeting Friday at 4 PM, John's office.
	7/8/2014 10:39	Brown, Jerald	Alpha Promotions	Turner, Cindy	Normal	Rescheduling app	Jerald suggests we meet on Thursday afternoon,
	7/8/2014 10:40	Brown, Jerald	Alpha Promotions	Turner, Cindy	Normal	Jerald's wife	Name is Elizabeth; helps with bookkeeping.
	7/8/2014 10:42	Schiff, Randy	Alpha Promotions	Smith, Jennifer; T	High	Thursday	Can't make it on Thursday until 3 PM, is that OK?
	7/8/2014 10:45	Brown, Jerald	Alpha Promotions	Turner, Cindy	Normal	Thursday appoint	Set meeting for Thursday at 3 PM.

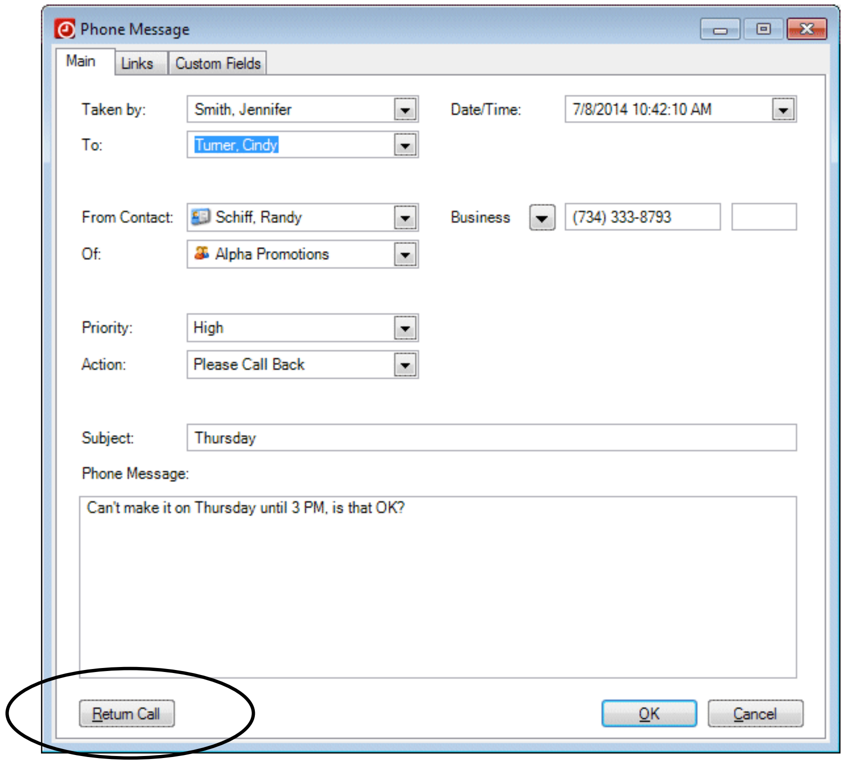
    - The Phone Messages portlet displays the phone message we entered for staff member CAT. Double-click a phone message to open it, or click the portlet title bar to open the Interactions tab of the Manage Clients screen.



Phone Messages

Priority	From	Date/Time	Subject	Body	Action
Normal	Collins, Tom	4/3/2014 4:47 P	Tax Returns		Please Call Back
High	Schiff, Randy	7/8/2014 10:42	Thursday	Can't make it on T	Please Call Back

- With a Phone Message dialog open, you can click the Return Call button at the bottom of the dialog to start a new Phone Call interaction with contact information already filled in. If you set your user preferences to start a timer with a new Phone Call interaction, a timer opens along with the new interaction.



Note: Once you have returned the call, you can clear messages from the Phone Messages portlet by selecting messages, then right-clicking and choosing Clear Selected Phone Messages from the context menu.

Enabling phone message notifications

If your firm administrator enables desktop notifications for phone messages, you can receive these notifications from Practice CS whenever phone messages are entered for you by other staff members. To activate phone message notifications, perform the following steps.

Note: Any staff member with sufficient security privileges can enable phone message notifications for the firm by marking the *Notify Staff when a Phone Message is taken for them* checkbox on the Notifications tab of the Firm setup screen.

1. Choose Setup > User Preferences.
2. On the System tab, mark the *Enable desktop notifications for monitored events* checkbox.

3. If you want notifications to remain on screen until you close them manually, mark the *Show desktop notifications until closed* checkbox.

4. Click OK to save your changes.

Printing reports

The Client Management module includes reports that enable your firm to print interactions with clients, contacts, or others, as well as information on clients won or lost.

Interaction Listing report

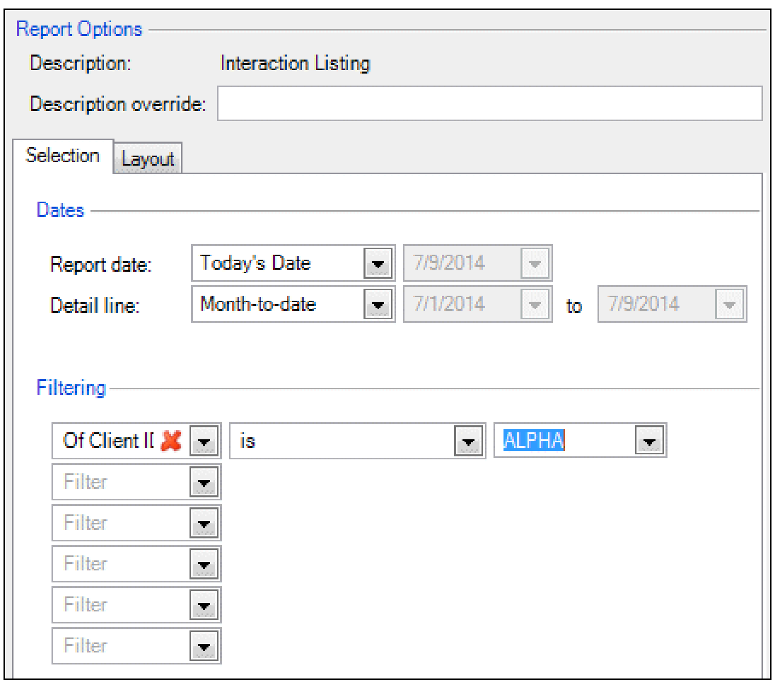
The Interaction Listing report lists interactions stored in Practice CS, and can be filtered to print only the interactions that meet certain criteria.

1. Choose File > Print Reports to open the Print Reports screen.

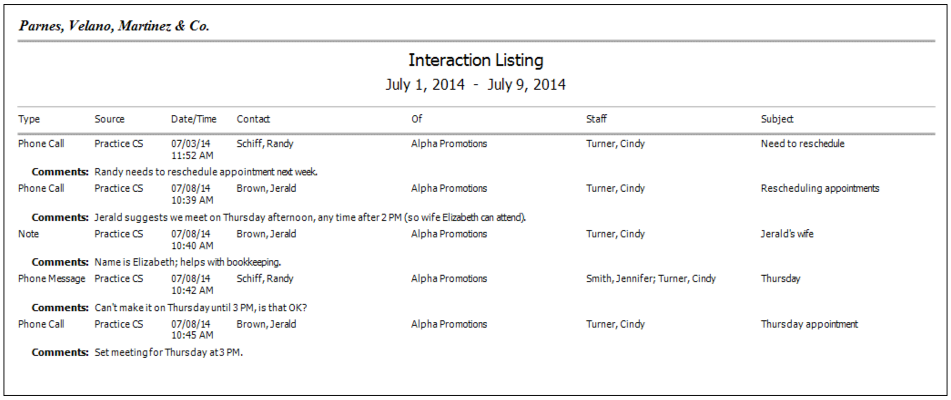
2. In the Client Management section of the report list, highlight the Interaction Listing report, and then click the Select button.

3. In the Selection tab, make the following selections (see illustration).

Field	Entry
Report date	**Today's Date**
Detail line	**Month-to-date**
Filtering	**Of Client ID / is / ALPHA**



4. Click the Preview Selected button to view the report on screen. Because we limited the results to a single client for the month-to-date, the report will contain only the interactions that we entered earlier in this walkthrough.



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Interaction Listing

July 1, 2014 - July 9, 2014

Type	Source	Date/Time	Contact	Of	Staff	Subject
Phone Call	Practice CS	07/03/14 11:52 AM	Schiff, Randy	Alpha Promotions	Turner, Cindy	Need to reschedule
Comments: Randy needs to reschedule appointment next week.						
Phone Call	Practice CS	07/08/14 10:39 AM	Brown, Jerald	Alpha Promotions	Turner, Cindy	Rescheduling appointments
Comments: Jerald suggests we meet on Thursday afternoon, any time after 2 PM (so wife Elizabeth can attend).						
Note	Practice CS	07/08/14 10:40 AM	Brown, Jerald	Alpha Promotions	Turner, Cindy	Jerald's wife
Comments: Name is Elizabeth; helps with bookkeeping.						
Phone Message	Practice CS	07/08/14 10:42 AM	Schiff, Randy	Alpha Promotions	Smith, Jennifer; Turner, Cindy	Thursday
Comments: Can't make it on Thursday until 3 PM, is that OK?						
Phone Call	Practice CS	07/08/14 10:45 AM	Brown, Jerald	Alpha Promotions	Turner, Cindy	Thursday appointment
Comments: Set meeting for Thursday at 3 PM.						

5. Click the Back button in the toolbar to return to the Print Reports screen.
6. Click the Remove button to remove the Interaction Listing report from the Selected Reports list.

Clients Won report

The Clients Won report shows all clients and their date won. Data is derived from the *Won date* field on the Clients setup screen.

1. Highlight the Clients Won report and click the Select button.
2. In the Selection tab, select Today's Date in the *Report date* field.
3. Click the Layout tab and select Client Won Reason in the first *Group by* field.

4. Click the Preview Selected button to view the report on screen. The report shows a list of clients grouped by Won Reason.

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Clients Won
Wednesday, July 09, 2014

ID	Description	Office	Partner	Won Date	Won Reason	Referred By
Price						
HANNA	Hanna, Jason	Michigan Office	Rogers, Melissa	01/01/11	Price	Walk In
Reputation						
AAC	Advanced Advertising Consultan	Michigan Office	Miller, Steve	09/27/10	Reputation	Miller, Steve
ABCP	ABC Partnership	Michigan Office	Miller, Steve	09/27/10	Reputation	Better Business Bureau
ALPHA	Alpha Promotions	California Office	Rogers, Melissa	01/01/11	Reputation	Collins, Brown & Lewis Adv
ANIMAL	Animal Shelter 101	Michigan Office	Turner, Cindy	01/01/11	Reputation	Rotary Club
BINGS	Bing, Sally	Michigan Office	Miller, Steve	01/01/11	Reputation	Bing, Ted & Angela
BROWNJ	Brown, Jerald & Elizabeth	Michigan Office	Miller, Steve	01/01/11	Reputation	Collins, Brown & Lewis Adv
CRAWFORD	Crawford's Steak House	California Office	Turner, Cindy	01/01/11	Reputation	Better Business Bureau
GOLDEN	Golden, Michael & Meredith	Michigan Office	Rogers, Melissa	01/01/11	Reputation	Smith, Jennifer
MANSFIELD	Mansfield, Edward & Sylvia	California Office	Turner, Cindy	01/01/11	Reputation	Anderson, Joe & Kim
PROTO	Prototype Design	Michigan Office	Miller, Steve	01/01/11	Reputation	Miller, Steve
QBL	Collins, Brown & Lewis Adv	California Office	Miller, Steve	01/01/11	Reputation	Website
QUINN	Quinn, Brian & Michelle	Michigan Office	Rogers, Melissa	01/01/11	Reputation	Rogers, Melissa
WILSON	Wilson, Dan & Joanne	California Office	Turner, Cindy	01/01/11	Reputation	Benton, Stephanie
Services Offered						
ACEADVERT	Ace Advertising	Michigan Office	Rogers, Melissa	01/01/11	Services Offered	Website
ANDERSON	Anderson, Joe & Kim	Michigan Office	Rogers, Melissa	01/01/11	Services Offered	Johnson, Kimberly
BINGTA	Bing, Ted & Angela	Michigan Office	Miller, Steve	01/01/11	Services Offered	Website
JONESRJ	Jones, Ron & Jenny	Michigan Office	Rogers, Melissa	01/01/11	Services Offered	Website
SMITH	Smith, Tom & Kathleen	California Office	Turner, Cindy	01/01/11	Services Offered	Website
Staff Expertise						
BENTON	Benton, Stephanie	Michigan Office	Miller, Steve	07/03/14	Staff Expertise	Newspaper Insert

Client count = 20

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5. Click the Back button in the toolbar to return to the Print Reports screen.

6. Click the Remove button to remove the Clients Won report from the Selected Reports list.

Clients/Prospects Lost report

The Clients/Prospects Lost report shows all clients or prospective clients that were lost within a specified date range.

1. Highlight the Clients/Prospects Lost report and click the Select button.

2. In the Selection tab, select Today's Date in the *Report date* field.

3. Click the Layout tab and select Client Lost Reason in the first *Group by* field.

4. Click the Preview Selected button to view the report on screen. In this case, there are no lost clients or prospects.

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Clients/Prospects Lost

Wednesday, July 09, 2014

ID	Description	Office	Partner	Start Date	Lost Date	Loss Reason	Lost To
Price							
WILSON	Wilson, Dan & Joanne	California Office	Turner, Cindy	01/01/11	07/03/14	Price	Another Local Firm
Unspecified							
AAC	Advanced Advertising Consultan	Michigan Office	Miller, Steve	09/27/10			
ABCP	ABC Partnership	Michigan Office	Miller, Steve	09/27/10			
ACEADVERT	Ace Advertising	Michigan Office	Rogers, Melissa	01/01/11			
ALPHA	Alpha Promotions	California Office	Rogers, Melissa	01/01/11			
ANDERSON	Anderson, Joe & Kim	Michigan Office	Rogers, Melissa	01/01/11			
ANIMAL	Animal Shelter 101	Michigan Office	Turner, Cindy	01/01/11			
BENTON	Benton, Stephanie	Michigan Office	Miller, Steve	01/01/11			
BINGS	Bing, Sally	Michigan Office	Miller, Steve	01/01/11			
BINGTA	Bing, Ted & Angela	Michigan Office	Miller, Steve	01/01/11			
BROWNJ	Brown, Jerald & Elizabeth	Michigan Office	Miller, Steve	01/01/11			
CRAWFORD	Crawford's Steak House	California Office	Turner, Cindy	01/01/11			
GOLDEN	Golden, Michael & Meredith	Michigan Office	Rogers, Melissa	01/01/11			
HANNA	Hanna, Jason	Michigan Office	Rogers, Melissa	01/01/11			
JONESRJ	Jones, Ron & Jenny	Michigan Office	Rogers, Melissa	01/01/11			
MANSFIELD	Mansfield, Edward & Sylvia	California Office	Turner, Cindy	01/01/11			
PROTO	Prototype Design	Michigan Office	Miller, Steve	01/01/11			
QBL	Collins, Brown & Lewis Adv	California Office	Miller, Steve	01/01/11			
QUINN	Quinn, Brian & Michelle	Michigan Office	Rogers, Melissa	01/01/11			
SMITH	Smith, Tom & Kathleen	California Office	Turner, Cindy	01/01/11			

Client count = 20

5. Click the Back button in the toolbar.

6. Click the Remove button.

Collection Summary report showing referral sources

To see how you can use information from the Client Management module, print a Collection Summary report grouped by referral source.

1. In the Collection section of the reports list, double-click the Collection Summary report.

2. Click the Selection tab and make the following selections.

Field	Entry
Report date	Today's Date
Detail line	Year-to-date

3. Click the Layout tab and make the following selections.

Field	Entry
Detail by	Client Family
Group by	Client Referred By

4. Click the Preview Selected button to view collections for the year to date, grouped by referral source.

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Collection Summary

January 1, 2014 - July 9, 2014

ID	Name/Description	Collected Amount	Application: Invoices	Debit Memos	Service Charges	Unapplied	Average Days To Collect
Anderson, Joe & Kim							
MANSFIELD	Mansfield, Edward & Sylvia	450.00	450.00	0.00	0.00	0.00	59
	Anderson, Joe & Kim Totals	450.00	450.00	0.00	0.00	0.00	59
Better Business Bureau							
ABCP	ABC Partnership	17,600.00	17,600.00	0.00	0.00	0.00	27
CRAWFORD	Crawford's Steak House	15,188.42	15,066.48	0.00	121.94	0.00	43
	Better Business Bureau Totals	32,788.42	32,666.48	0.00	121.94	0.00	40
Collins, Brown & Lewis Adv							
BROWNJ	Brown, Jerald & Elizabeth	5,211.84	5,200.00	0.00	11.84	0.00	28
	Collins, Brown & Lewis Adv Totals	5,211.84	5,200.00	0.00	11.84	0.00	28
Miller, Steve							
AAC	Advanced Advertising Consultan	50,000.00	50,000.00	0.00	0.00	0.00	17
PROTO	Prototype Design	5,419.43	5,350.00	0.00	69.43	0.00	66
	Miller, Steve Totals	55,419.43	55,350.00	0.00	69.43	0.00	58
Rogers, Melissa							
QUINN	Quinn, Brian & Michelle	3,500.00	3,500.00	0.00	0.00	0.00	21
	Rogers, Melissa Totals	3,500.00	3,500.00	0.00	0.00	0.00	21
Rotary Club							
ANIMAL	Animal Shelter 101	6,094.68	6,000.00	0.00	94.68	0.00	49
	Rotary Club Totals	6,094.68	6,000.00	0.00	94.68	0.00	49
Website							
ACEADVERT	Ace Advertising	2,991.18	2,975.00	0.00	16.18	0.00	37
QBL	Collins, Brown & Lewis Adv	8,500.00	8,500.00	0.00	0.00	0.00	41

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5. Click the Back button.

6. Click the Remove button.

Synchronizing contacts

The Client Management module enables you to synchronize contacts between Practice CS and Microsoft Outlook. Staff members can create filters that enable synchronization only for their own contacts.

When a contact is added in Practice CS that meets the filter criteria established by the staff member, that contact will be added to Outlook upon the next synchronization. Changes to contact information will be transmitted between the two programs. We recommend that you make changes to contact information in Practice CS, which will then be synchronized with Outlook.

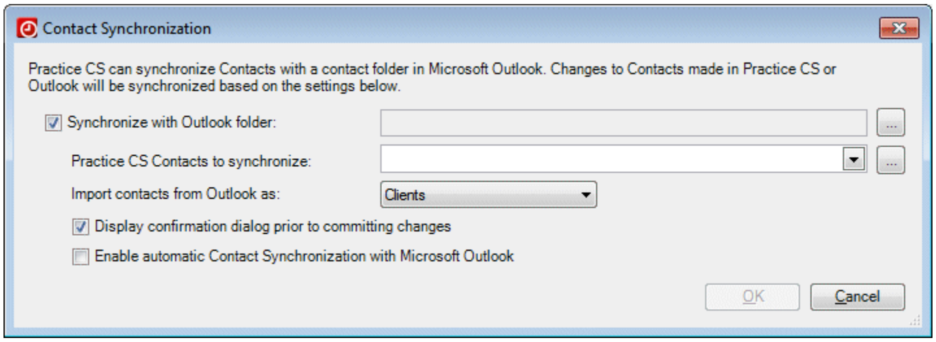
You can sync your contacts manually, or set up automatic synchronization. With automatic synchronization, you can choose to have a confirmation dialog appear each time a change is made in Practice CS or Outlook.

Setting up contact synchronization

To set up contact synchronization, follow these steps.

1. Choose Setup > System Configuration > Outlook > Contact Synchronization.

2. In the Contact Synchronization dialog, mark the *Synchronize with Outlook folder* checkbox.



3. Click the browse button next to the *Synchronize with Outlook folder* field.

4. In the Select Folder dialog, click the New button to create a new Outlook contacts folder to synchronize with Practice CS.

Important!

- For this exercise, because you are working with sample data and these are not your firm's contacts, you should create an empty contacts folder in Outlook to prevent adding unwanted contacts to your main contacts folder in Outlook.
- You should not select a folder for synchronization that contains contacts that you do not want to appear in both Practice CS and Outlook.
- The folder you select for synchronization is user specific and can be different from the folders selected by your co-workers.

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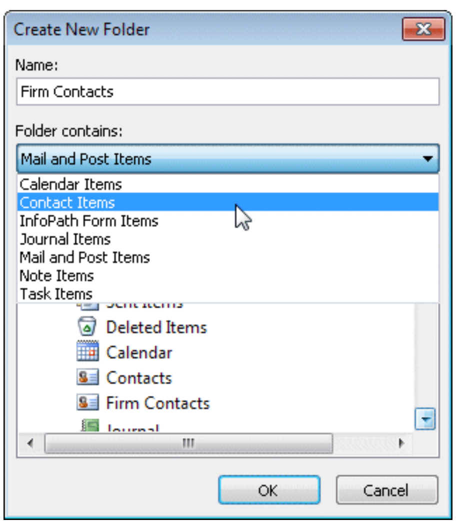
5. In the Create New Folder dialog, enter a name for the new folder in the *Name* field.

6. In the *Folder contains* field, select Contact Items from the drop-down list.

7. Select the location where the new folder should be created, such as your mailbox or inbox.



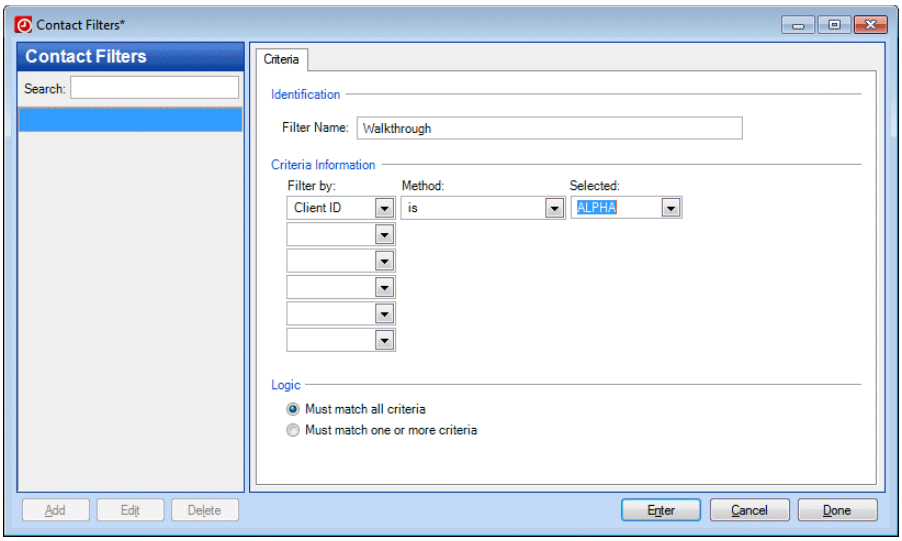
8. Click OK to close the Create New Folder dialog in Outlook.

9. Click the browse button next to the *Practice CS Contacts to synchronize* field. The Contact Filters dialog opens.

10. In the Contact Filters dialog, click the Add button and enter **Walkthrough** as the name for the new filter in the *Filter Name* field.

11. In the first *Filter by* field, select Client ID, then complete the row by selecting **is** in the *Method* field and client **ALPHA** for the client.

12. Click the *Must match all criteria* option.



13. Click Enter to save your changes, and then click Done to close the Contact Filters dialog.

14. Select the Walkthrough filter from the drop-down list in the *Practice CS Contacts to synchronize* field.

Notes

- If you change your contact filter in Practice CS, contacts previously synchronized between Outlook and Practice CS will be removed from Outlook if they no longer meet the criteria of the new filter.
- For more information on using filters, choose Help > Help & How-To and enter the keyword **filters** in the search field.

---

15. In the *Import contacts from Outlook as* field, select Clients.

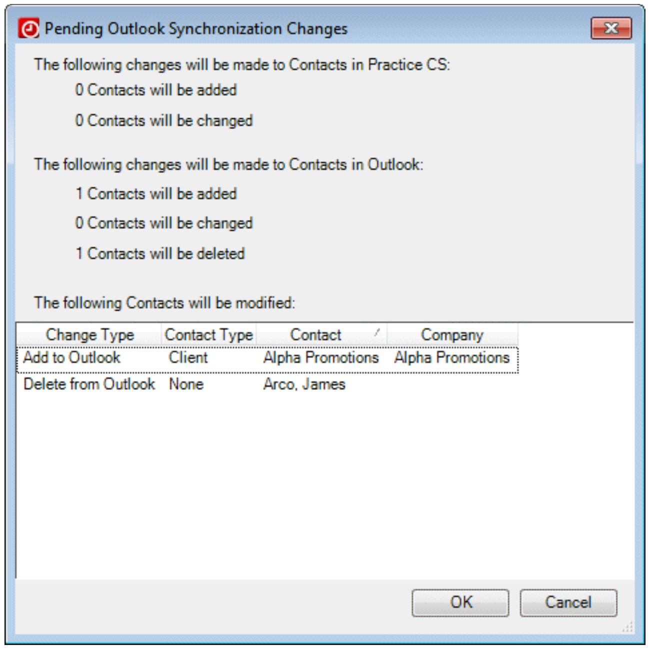
Note: For client contacts, new clients are created in Practice CS using a default naming scheme. You should rename these clients with IDs that fit your firm's naming scheme.

---

16. Mark the *Enable automatic Contact Synchronization with Microsoft Outlook* checkbox.

17. Click OK to close the Contact Synchronization Setup dialog and synchronize your contacts.

18. The Pending Outlook Synchronization Changes dialog opens, informing you of the changes that will be made to your Outlook contacts folder based on the filter you just created. Click OK. The contacts are added to your Outlook contacts folder.



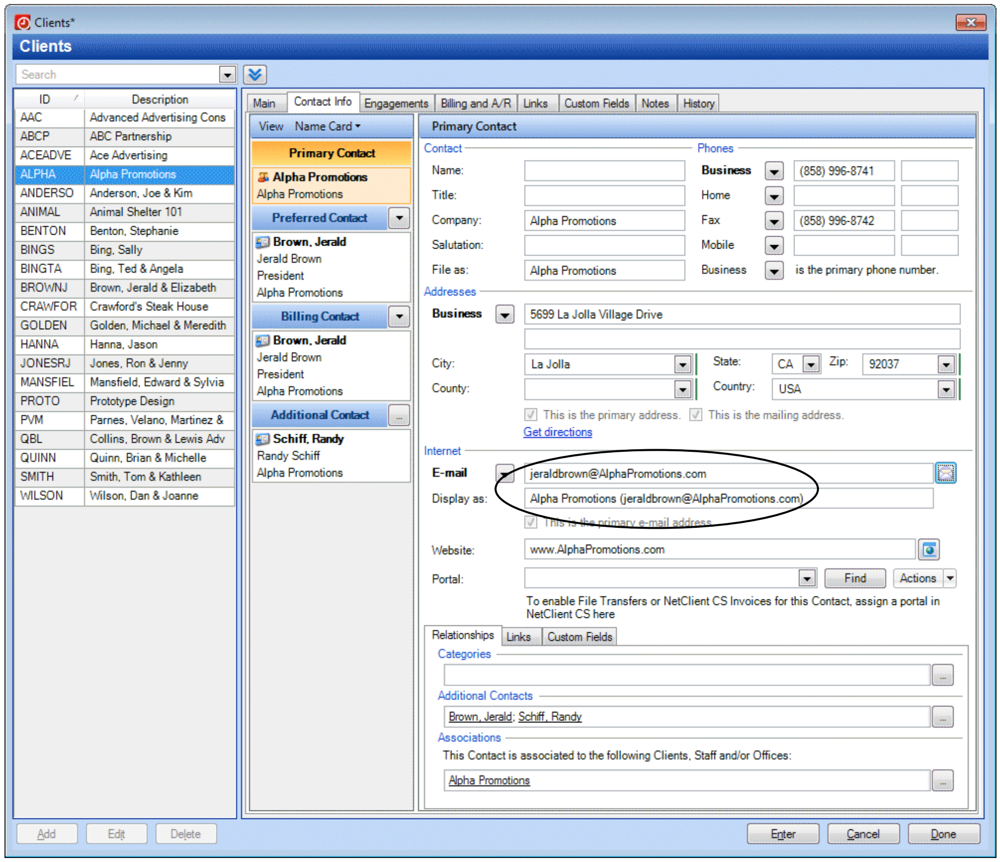
Automatic contact synchronization in action

To see how contact synchronization works, make a change to a contact's information. For this walkthrough, change the email address for contact James Arco.

1. In Practice CS, choose Action > Manage Clients.
2. Select client ALPHA on the Clients tab.
3. Right-click and choose Edit Selected Clients from the context menu.
4. Click the Contact Info tab and select Primary Contact in the left pane.

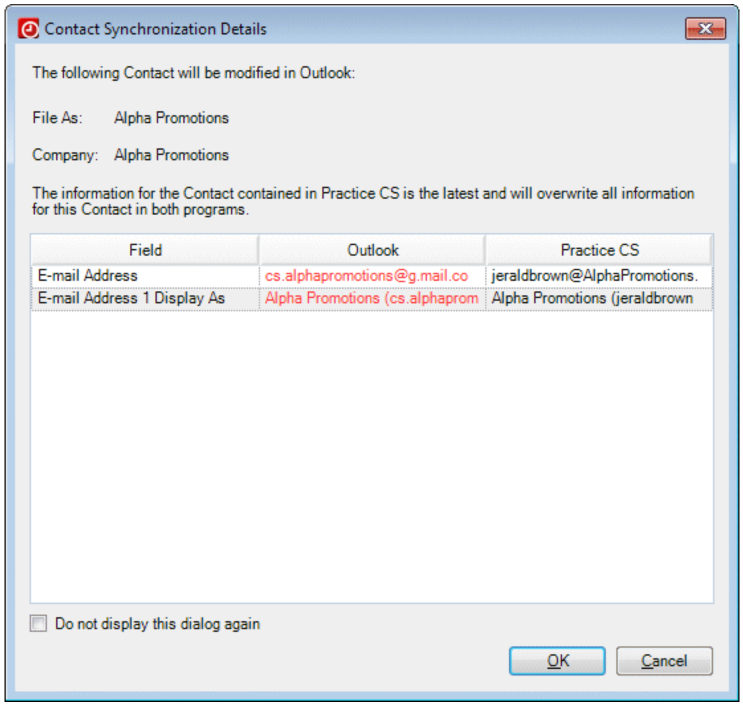
5. In the *E-mail* field, change the email address to **jeraldbrown@AlphaPromotions.com**.

6. Delete the text in the *Display as* field, and then press TAB to leave the field. Information in the *Display as* field is then updated automatically based on what you entered in the *E-mail* field.



7. Click Enter to save your changes.

8. The Contact Synchronization Details dialog shows you which contact will be modified and the information that will be changed.



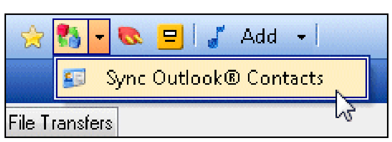
9. Click OK to accept the changes.
10. Click Done to close the Clients dialog.

Notes

- The same process will automatically synchronize changes made to a contact in Outlook.
- When automatic synchronization is enabled, you will see changes made automatically when a contact is added or modified in Practice CS or Outlook, and each time you open Practice CS.

Synchronizing contacts manually

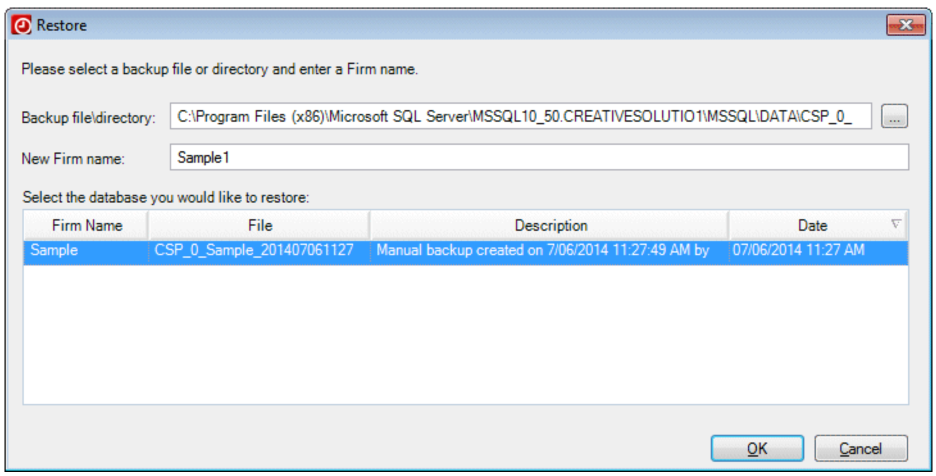
To synchronize your contacts manually, click the arrow next to the Sync button in the Practice CS toolbar and choose Sync Outlook Contacts.



Restoring the sample database

After you have completed this walkthrough, you should restore the sample database that you backed up (see “Backing up the sample database” on page 2). Use the restored sample database to complete other Practice CS walkthroughs.

1. From the File menu, choose Restore.
2. In the *Backup file\directory* field, enter the path to the backup file that you want to restore, or click the browse button to navigate to the backup location (usually **X:**\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data, where **X:** is the drive on the computer where the data resides).
3. In the Restore File Location dialog, click the backup file that you want to restore and click OK.
4. In the Restore dialog, enter a new name for the database in the *New Firm name* field.



Note: When you restore the Sample database, you must give it a different name. The restore process in *Practice CS* does not overwrite an existing database, and *Practice CS* does not allow firm databases with duplicate names. Therefore, you will need to give the database a different name when you restore it (for example, **Sample1**). The name may contain only alphanumeric characters.