
MOBILE CS

Getting Started

version 2.2.1

MOBILE CS[®]

part of the
CS PROFESSIONAL SUITE[®]



CS Support: 800-968-0600
CS Sales: 800-968-8900
Tax.ThomsonReuters.com/CS



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Welcome to Mobile CS

Mobile CS is the first firm management app exclusively for tax and accounting professionals. It's convenient. It's quick. And it gives you on-the-go access to the firm, client, and staff information you need to know, whenever you want to know it. Mobile CS is a great way to stay connected and in control of your firm no matter where you happen to be.

Mobile CS currently works on all Apple® iOS devices (including the iPhone®, iPad®, and iPod touch®) version 8.1 or higher, and on Android™ devices version 5.0 or higher. With it, you'll always have access to the important information you need to make timely decisions regarding the day-to-day operations of your practice.

Mobile CS is made up of two parts: the Mobile CS app and Mobile CS Link.

What is the Mobile CS app?

The Mobile CS app enables you to access relevant CS Professional Suite application data on mobile devices, from any location. With the Mobile CS app, you can review Practice CS® content such as:

- **Firm-level data:** Real-time data on firm operations, key totals, WIP and A/R recap, and more.
- **Staff workload and availability:** Information such as staff availability, projects, and tasks.
- **Client contact and interactions:** Client contact information, a log of client interactions, and details on client activity.
- **Additional resources:** Resources such as our website, Tax & Accounting Community, Practice CS Library, and more.

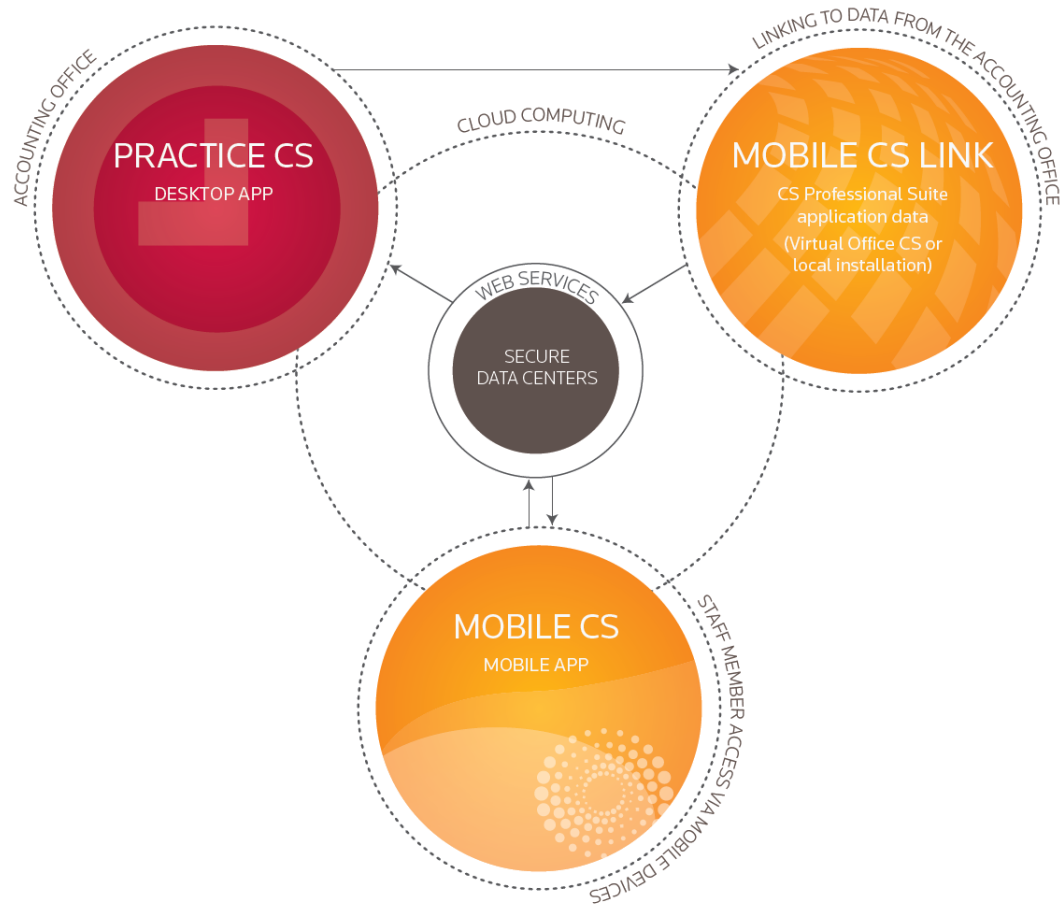
What is Mobile CS Link?

Mobile CS Link is a desktop application used to synthesize relevant data from your CS Professional Suite applications and make that data available to mobile devices on which you have installed the Mobile CS app. Mobile CS Link keeps your CS Professional Suite data up to date for users who access it via the Mobile CS app. To provide 24/7 access to your CS Professional Suite data, Mobile CS Link creates a cloud storage area for your firm's data. At regular intervals, Mobile CS Link queries your CS Professional Suite data and updates your cloud-based, mobile dataset.

Use Mobile CS Link to set up a data storage area and password to access your CS Professional Suite data via the Mobile CS app. After you set up your data storage area and password for Mobile CS, your firm administrator will need to enable the Mobile CS app for each staff member who will use it.

Note: Virtual Office CS[®] users and Software as a Service (SaaS) users do not need to download and install Mobile CS Link. Your NetFirm CS[™] administrator must grant permission to access Mobile CS Link. See the NetFirm CS administration help for details.

The following illustration shows how Mobile CS lets you access your Practice CS data.



- SEND YOUR DATA TO OUR SECURE SERVERS VIA MOBILE CS LINK
 - LOG IN TO MOBILE CS VIA MOBILE DEVICE
 - RETRIEVE YOUR MOBILE CS DATA

How to use this guide

This guide provides information about the following setup steps.

- Installing and configuring Mobile CS Link
- Enabling the Mobile CS app for staff members

Note: Your firm administrator or staff member designated for maintenance of your CS Professional Suite data should establish security privileges and enable access to Mobile CS for your staff.

- Downloading the Mobile CS app from the Apple App Store or Google Play™ media store
- Logging in to the Mobile CS app via your mobile device



Installation Instructions

This chapter lists system requirements and the steps required to download and install Mobile CS Link and the Mobile CS app.

System requirements

For the latest system requirements information, please see the [Practice CS / Mobile CS system requirements](#).

Mobile CS Link

The following items must be installed on the workstation on which you install Mobile CS Link.

- Practice CS v.2020.2.0 or higher
- Microsoft® Windows® 8.1 or higher

In addition, your firm must be licensed for NetFirm CS to enable Mobile CS for your staff.

- If your firm is licensed for NetFirm CS, your firm administrator must create a NetStaff CS® portal for each staff member who will use Mobile CS. Please see the topic [Adding staff portals](#) in the NetFirm CS help for more information.
- If your firm is not licensed for NetFirm CS, please contact your Sales representative at (800) 968-8900 for more information.

Mobile CS App

The Mobile CS app is compatible with Apple devices (including the iPhone, iPod touch, and iPad) and with Android devices. For minimum mobile operating system requirements, see the [Practice CS / Mobile CS system requirements](#).

Overview of Mobile CS installation

To install Mobile CS, you will perform the following procedures.

- Download and install Mobile CS Link
- Download the Mobile CS app

Download and install Mobile CS Link

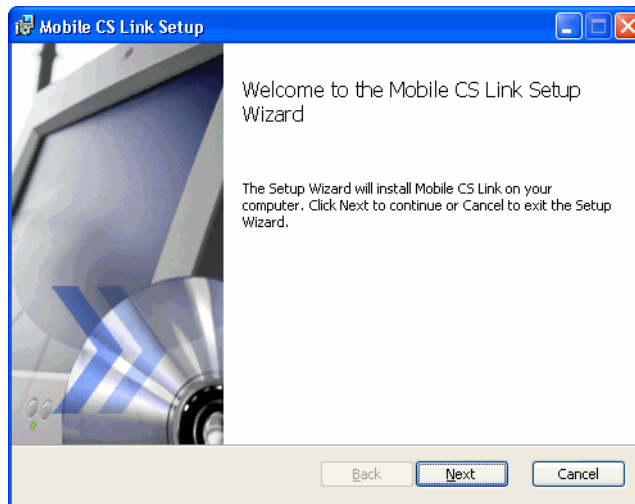
Notes

- Mobile CS Link should be installed on only one computer that is running at all times, because your firm data can be updated only while the computer is running. You may want to install Mobile CS Link on the computer that is used as your firm's server.
- If you access your CS Professional Suite applications through Virtual Office CS or SaaS, your NetFirm CS administrator grants access to Mobile CS Link through NetFirm CS administration. For more information, open the NetFirm CS administration help and search on Mobile CS.

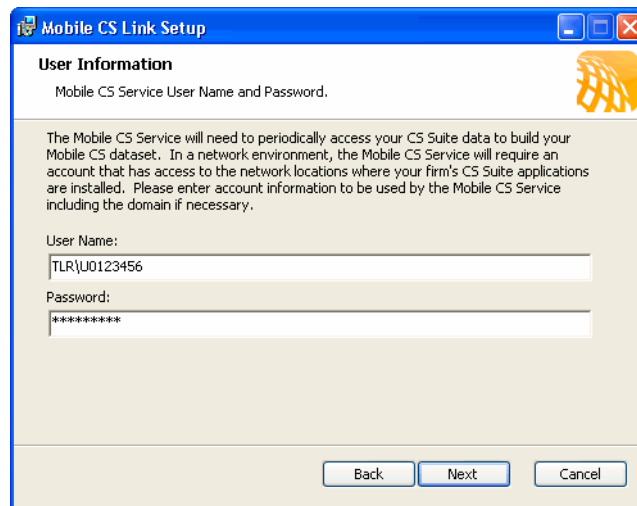
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1. Verify that you are logged in to your computer or server as an administrator.
 2. Close all open applications, including background virus protection software.
 3. Uninstall previous versions of Mobile CS Link before installing a new version/update. If this is the first time you're installing Mobile CS Link, proceed to Step 4.
 4. Visit the Downloads page in the Support section of our website at Tax.ThomsonReuters.com, and follow the instructions to save the installation MSI file to your local drive.

Notes

- The Mobile CS download page is available only if you are licensed for both Practice CS and NetFirm CS.
 - If you do not yet have a web account, you will be prompted to establish one when you attempt to download software from our website.
 - Depending on your browser's security settings, you may be prompted to allow the download of the MSI file and you may not have the option to click the Run button to begin installation automatically.
-
4. After you have downloaded the MSI file, double-click it to start the installation wizard.
 5. When the Mobile CS Link Setup Wizard opens, click the Next button.



6. In the User Information screen, enter the Windows login credentials (user name and password) for the account to be used by the Mobile CS Service. In a network environment, be sure to include the domain (if necessary) in the *User Name* field, and be sure to use an account that has sufficient rights to access your firm's CS Professional Suite applications and data. **Example:**



The screenshot shows a Windows-style dialog box titled "Mobile CS Link Setup". Inside, the "User Information" section is active, with the subtitle "Mobile CS Service User Name and Password." Below this, a paragraph explains that the Mobile CS Service needs periodic access to CS Suite data and requires a network account with sufficient rights. It asks the user to enter account information. There are two input fields: "User Name:" containing "TLR\U0123456" and "Password:" containing "*****". At the bottom are "Back", "Next", and "Cancel" buttons.

Note: Mobile CS Link is a standard Windows service that requires Windows login credentials with sufficient rights to access your firm's CS Professional Suite applications and data. If the password on this account is changed, you will also need to change the password on the Mobile CS service. Therefore, we recommend that you use an account for which the login information does not change often. If you do need to update the password on the Mobile CS service (for example, if the password on the Windows user account is changed), please see the topic [Changing the password for the Mobile CS Windows service](#) for instructions.

7. Click the Next button.
8. When the wizard indicates that Mobile CS Link setup is complete, click the Finish button.

After you have installed Mobile CS Link, you will need to enable access to Mobile CS for specific staff members, and make the firm's CS Professional Suite application data available to their mobile devices. See "Setting Up and Using Mobile CS" on page 11 for instructions.

Download the Mobile CS app

To download the Mobile CS app, visit the [Apple App Store](#) or the [Google Play](#) store on your mobile device and search on **Mobile CS**. After you review the app information screen, follow the directions to install the app.



Setting Up and Using Mobile CS

This chapter describes the steps required to set up and use Mobile CS, including the following tasks.

- Enabling access to Mobile CS for specific staff members.
- Making the relevant CS Professional Suite application data available to mobile devices.
- Using the Mobile CS app on your mobile device.

Enabling Mobile CS for staff members

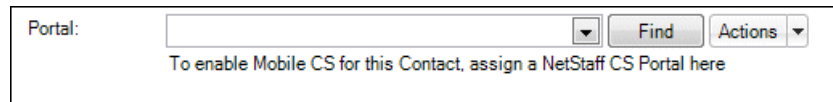
Your firm administrator must enable Mobile CS for each staff member who will be allowed to access your CS Professional Suite data via their mobile devices. These steps should be performed by a staff member who has the security privileges needed to edit staff records and security settings in Practice CS.

Notes

- To ensure the security of your mobile dataset, your firm administrator must create a NetStaff CS portal for each staff member who will use Mobile CS. Staff members will then use their NetStaff CS login credentials to log in to the Mobile CS app. Please see the topic [Adding staff portals](#) in the NetFirm CS help for more information.
 - Mobile CS does not have feature-based security. Your firm should evaluate the app and determine which staff members should have access to the app before making it available to all staff members.
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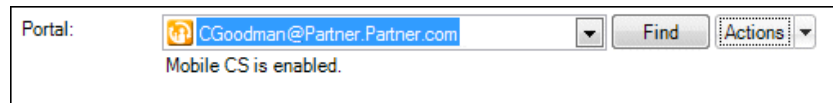
To enable Mobile CS in Practice CS, follow these steps.

1. Start Practice CS.
2. Choose Setup > Staff, and select the staff member for whom you want to enable Mobile CS.
3. Click the Edit button.
4. Click the Contact Info tab.
5. In the *Portal* field, select the staff member's NetStaff CS portal from the drop-down list.



The screenshot shows a web interface for selecting a portal. It features a label 'Portal:' followed by a text input field. Below the input field is a hint: 'To enable Mobile CS for this Contact, assign a NetStaff CS Portal here'. To the right of the input field are two buttons: 'Find' and 'Actions'.

6. Click the Actions button and choose **Enable Mobile CS for <name of portal>** from the drop-down list.



This screenshot shows the same interface as the previous one, but with the 'Actions' button clicked. A dropdown menu is now visible, showing the email address 'CGoodman@Partner.Partner.com' and the status 'Mobile CS is enabled.'.

7. Click Enter to save your changes.

Using Mobile CS Link to make data available to mobile devices

Note: Mobile CS Link should be used only by the staff member in your firm who is responsible for the maintenance of your CS Professional Suite application data.

To make your firm's data available to mobile devices, you will first use Mobile CS Link to create a data storage area. To ensure a secure connection to the data storage area, you will provide a NetStaff CS login that is enabled for Mobile CS, and establish a Mobile CS Link password.

After you have created your data storage area, you will use Mobile CS Link to create a "dataset," which is the portion of your CS Professional Suite application data that users will access via their mobile devices. The dataset resides in a cloud storage area that is accessible to mobile devices. Using login credentials that you specify during the setup

process, Mobile CS Link will update the mobile dataset with current information from your local database at regular intervals of your choosing.

1. Verify that you are logged in to your computer or server as an administrator.
2. Do one of the following:
 - For local installations of Practice CS, start Mobile CS Link by opening the Start menu and choosing All Programs > CS Professional Suite > Mobile CS Link.
 - For Virtual Office CS or SaaS users of Practice CS: Click the Mobile CS Link icon in the Virtual Office CS section of your NetStaff CS portal. Enter your NetStaff CS password and then go to step 6 of this procedure.
3. In the Mobile CS Data Storage dialog, complete the following fields.
 - NetStaff CS: Enter your NetStaff CS login and password in the fields provided.

Note: You must have Mobile CS enabled in Practice CS for this NetStaff CS login.

- Mobile CS Link: In the *Password* field, enter a password you will use to log in to Mobile CS Link. In the *Retype Password* field, re-enter the Mobile CS Link password to confirm.

Mobile CS Data Storage

Before the Mobile CS app can access your firm's data, a data storage area will need to be created for your firm. To ensure a secure connection to the storage area, you must provide a NetStaff CS login that is enabled for Mobile CS and establish a Mobile CS Link password. The password will be required to access Mobile CS Link on subsequent visits.

Firm ID: XXXXXX

NetStaff

Login:

Password:

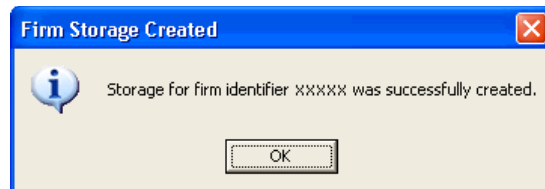
Mobile CS Link

Password:

Retype Password:

OK Cancel

4. Click OK.
5. At the prompt, click OK.



6. When Mobile CS Link opens, click the Add button to create a dataset.

Note: You can set up one or more datasets for your firm. Firms that maintain multiple data locations for a single CS Professional Suite application (such as for different business entities or for multiple office locations) should consider setting up multiple datasets.

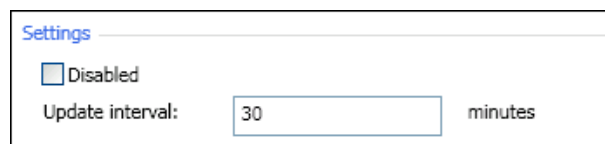
7. In the *Name* field, enter a name for the dataset. This is the name that users will enter on their mobile devices to access the dataset.

Note: Although the name can contain up to thirty characters, shorter names are easier to enter on mobile devices.

8. In the *Update interval* field, indicate how often you would like the mobile dataset updated. At the designated interval, the Mobile CS service will query your CS Professional Suite data and update the mobile dataset. Thirty minutes is the minimum update interval.

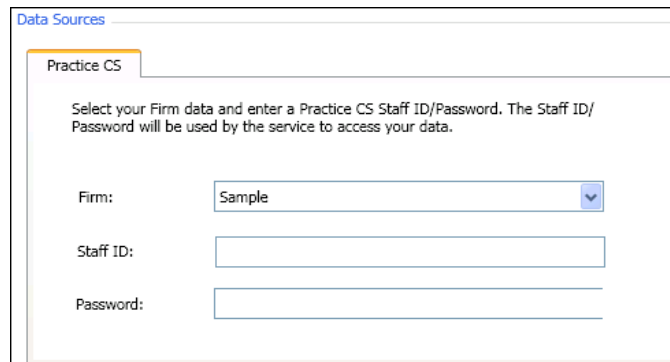
Notes

- If you ever want to temporarily stop Mobile CS Link from updating the mobile dataset, mark the *Disabled* checkbox.
 - The Settings section is not available for Virtual Office CS or SaaS users.
-



9. To make your firm's Practice CS data available to Mobile CS Link, select your Practice CS database from the *Firm* drop-down list.
10. Enter a Practice CS staff ID and password to be used by Mobile CS Link to query your Practice CS database when updating the mobile dataset.

Note: We recommend that you use a Practice CS login that is not used by an actual staff member. Consider using login credentials for an administrative staff member whose status is set to inactive but without a Left date entered. This avoids using one of your firm's licensed timekeepers. Also, if an actual staff ID is used, the Staff In/Out status in the Staff Availability portlet will not accurately represent the staff member's status. Further, if the staff member's password is changed in Practice CS, you will need to update the password in Mobile CS Link, too. Otherwise, Mobile CS Link will fail to update the Mobile CS dataset.



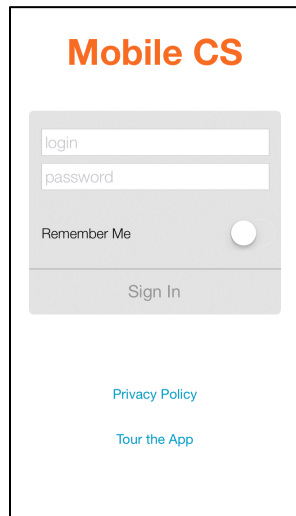
The screenshot shows a web interface titled "Data Sources" with a sub-tab labeled "Practice CS". Below the tab, there is a text instruction: "Select your Firm data and enter a Practice CS Staff ID/Password. The Staff ID/Password will be used by the service to access your data." Below this instruction are three input fields: "Firm:" with a dropdown menu currently showing "Sample", "Staff ID:" with an empty text box, and "Password:" with an empty text box.

11. Click Enter to save the dataset.

Logging in to the Mobile CS app via your mobile device

To log in to the Mobile CS app, follow these steps.

1. Select the Mobile CS app icon  on your mobile device.
2. In the login screen, enter the following information.
 - **NetStaff Login:** The user name for your NetStaff CS portal.
 - **Password:** The password for your NetStaff CS portal.
3. Select the Sign In button.



The screenshot shows the Mobile CS login interface. At the top, the text "Mobile CS" is displayed in orange. Below this is a login form with two input fields: "login" and "password". Under the "password" field is a "Remember Me" checkbox. A "Sign In" button is located below the form. At the bottom of the screen, there are two links: "Privacy Policy" and "Tour the App".

4. If multiple datasets are available to a particular NetStaff CS user, a chooser screen will open and display the available datasets during the sign-in process. Choose the name that your firm administrator entered for your dataset in Mobile CS Link.