



Related Products for Professional Services

Select how your firm is best assisted in implementing your new software. Choose from three plans that allow for minimal involvement to maximum guidance.

Implementation



Foundational Implementation

For self-motivated firms confident in their business processes.

Available for:

- Accounting CS
- AdvanceFlow
- Checkpoint® Engage
- Checkpoint®*
- Checkpoint® Edge*
- Fixed Assets CS
- GoFileRoom
- Inflo
- NetClient CS
- Onvio® Firm Management
- Practice CS
- Planner CS
- SMART
- UltraTax CS
- Workpapers CS
- K1 Analyzer

*indicates offering is complimentary



Guided Implementation

For firms who need dedicated help defining their processes.

Available for:

- Accounting CS
- AdvanceFlow
- Checkpoint Engage
- Checkpoint
- Checkpoint Edge
- FirmFlow
- GoFileRoom
- Inflo
- NetClient CS
- Onvio Firm Management
- Practice CS
- SMART
- UltraTax CS
- Workpapers CS
- K1 Analyzer



Specialized Implementation

For firms making complex changes that need significant guidance and maximum flexibility.

For specialized implementation of your Thomson Reuters products, please connect with us and we will work with you to determine how to best assist your firm through this process.

Continued learning and optimization

Firms who already have Thomson Reuters products can take advantage of programs designed to meet varying and ongoing needs.



Essential Continued Learning

Unlimited one-year access to a robust library of interactive eLearning and live, instructor-led training content.

Available for:

- Accounting CS
- AdvanceFlow
- Checkpoint*
- Checkpoint Edge*
- Checkpoint Engage
- FirmFlow
- Fixed Asset CS
- GoFileRoom
- GoSystem Tax RS
- Inflo
- K1 Analyzer
- NetClient CS
- Onvio
- Planner CS
- Practice CS
- SMART
- UltraTax CS
- Workpapers CS

*indicates offering is complimentary



Essential + Continued Learning

Unlimited one-year access to a robust library of interactive eLearning and live, instructor-led training content plus supplemental training hours to address unique firm needs in a private environment.

Available for:

- Accounting CS
- AdvanceFlow
- Checkpoint
- Checkpoint Edge
- Checkpoint Engage
- FirmFlow
- Fixed Asset CS
- GoFileRoom
- GoSystem Tax RS
- Inflo
- K1 Analyzer
- NetClient CS
- Onvio
- Planner CS
- Practice CS
- SMART
- UltraTax CS
- Workpapers CS



Optimization

Product or workflow guidance from a knowledgeable and experienced Thomson Reuters consultant combined with the Essential+ training content for a complete optimization experience.

Available for:

- Accounting CS
- AdvanceFlow
- FirmFlow
- GoFileRoom
- GoSystem Tax RS
- Inflo
- NetClient CS
- Onvio
- Practice CS
- UltraTax CS
- Workpapers CS

Technical Services

Offerings that save you time and resources in your software search and ensure the most effective solutions are implemented.



Conversions and Migration

Technical services provide migration and conversion services to save your firm significant time when compared to manually entering and uploading data.

Available for:

- GoFileRoom/FirmFlow
- AdvanceFlow**
- Practice CS

**migration of documents from Workpapers CS only



Custom Reports

Our team can design and deliver unique formats to visualize data in ways not available by default within your application.

Available for:

- GoFileRoom/FirmFlow
- Practice CS
- Accounting CS



Database Updates and Custom Utilities

Technical services provide updates and custom-built utilities to streamline your processes.

Available for:

- GoFileRoom/FirmFlow
- AdvanceFlow
- Practice CS
- Accounting CS