



## *Professional Services CPA Practice Manager Conversions*

### *Conversions of 3<sup>rd</sup> Party products to CPM:*

A standard conversion option is available that can include the conversion of client information, open WIP detail and open AR detail. An arrangement can be made for Professional Services to also convert due date monitoring from 3<sup>rd</sup> party software, billed WIP history including invoice history, AR collection history and/or the conversion of external databases for client contact mailer information and custom fields.

### *3<sup>rd</sup> Party Databases merged into existing CPM:*

Clients that maintain separate databases for client contacts, due date monitoring, referrals, mailers, prospects, etc. can have that information imported into the CPM database by Professional Services. This option is available to both new CPM clients and existing CPM clients.

### *Firm/Office Splits:*

For existing firms that make the decision to split out part of the practice, Professional Services can create a new database for the partners who are separating from the firm. The existing firm can also request that the pertinent information be removed from the original database.

### *Firm Merges:*

Firms who purchase other accounting firms can request that Professional Services merge the historical data of the new firm into their existing CPM database. The merging firm can be an existing CPM client or the information can be converted from a third party product.

### *Multi-Office Merges into one CPM:*

With SQL Server in place, clients can now report using one database, and still retain speed and power, eliminating the need to perform the multi office merge function within CPM. Many factors come into play with this conversion as time is entered and transferred to other offices when employees work on clients outside of their office. This situation is managed through the conversion.

### *Existing CPM Service Code/Employee Code Conversion:*

Occasionally, firms may decide to revamp either their existing service codes or their existing employee codes for various reasons. The Professional Services team will modify all information within the database to reflect this code restructuring.

### *Database Cleanup:*

Professional services can remove unwanted and historical data that is old and no longer needed, including inactive employees and service codes. This service helps the system run more efficiently and also allows users to reuse old service codes/employee numbers.

### *Proper-casing of existing database information:*

Older systems that are converted are typically entered with all uppercase information. Professional services offers a data clean up solution (ALL AREAS IF REQUESTED) that eliminates the uppercase to proper-case for cosmetic purposes and spot checks for errors. (MD, LLC, LLP, etc.)

## ***Professional Services***

### ***CPAAccounting Manager Conversions***

#### **Conversions of 3<sup>rd</sup> Party products to GL, AP, AR and PR:**

Non accounting firms use the CPAAccounting Manager to maintain only 1 or 2 sets of books. Professional services can take the existing company data from the current software package and convert it to create the GL chart of accounts, static employee data, vendors, customers in accounts receivable, and either detail or net changes to the general ledger. In some cases, payroll information can be converted as well.

#### **Maintenance of existing GL, AR, AP and PR on-site conversion programs:**

For accounting firms, CPA Client Write-Up currently supports 42 standard conversion programs used to convert the accountant's multiple company client data. Occasionally the accountant may have used his existing system in a unique way in order to accommodate special circumstances found in their particular customer base. Professional services can assist the accountant in the conversion of his client data by offering modifications to the standard canned conversions.

## ***Professional Services***

### ***CPA Practice Manager & CPAAccounting Manager Reports***

#### **VB One Time Reports:**

CPASoftware will build custom reports to your specifications. The Visual Basic custom report will work similar to the reports you are use to running today. The professional services team will estimate the amount of time to generate the report. One time customer reports will not include modifications for any future enhancements to the CPASoftware products. Professional services will be available to alter them for a nominal fee.

#### **Access One Time Reports:**

CPASoftware will modify an existing access report or build a custom report to your specifications. The professional services team will estimate the amount of time to generate the report to determine the pricing. As with the one time customer reports, access reports will not include modifications for any future enhancements to the CPASoftware products. Professional services will be available to alter them for a nominal fee.

#### **VB Custom Reports Subscription:**

Professional services have accumulated groups of custom reports and bundled them into a subscription service. Unlike the one time reports, future enhancements to the CPASoftware product will be covered. Modifications to the reports to accommodate future product changes are included as part of the subscription service. The professional services group will accept requests to tailor the custom report package for a fee. Upon evaluation the request may be added to the subscription or moved into the one time reports classification.