

# Practice Assistant

Designed to give you the power to get more done in less time.

Practice Assistant is a collection of powerful tools for managing your practice in an ever changing business and compliance environment.

## CLIENT MANAGEMENT SYSTEM

- Common user interface with quick access to each module.
- Stand alone or networked configuration with true data sharing capability.
- Unlimited number of clients (all types).

## DIARY AND TASKS

- Networking of appointments and tasks for shared access across your practice.
- Ability to synchronise diary with Microsoft Outlook.
- Appointments, events and tasks can be recorded as billable events in timesheets.

## TIMESHEETS AND BILLING

- Automatic time and cost recording (logs as you go).
- Job codes with pre-defined charge rates, job description and invoice text which can be customised.
- Flexible billing options: per time, per job or per table of fixed rates.
- Customise and print invoices and statement slips, individually or in batches.
- Performance report displays the summary of staff performance during the given period.
- SMS messaging system
- Instant or scheduled SMS messages from the Assistant program to single or multiple recipients.
- Allows creating and re-using of SMS templates.

## OTHER TOOLS AND FEATURES

- Data mining provides the ability to run queries on the database and generate user-defined reports.
- Exports to Excel, HTML, RTF or PDF for emailing.
- Multi-level security setup.

## DOCUMENT MANAGER

- Client files are stored in a central network location for easy access by staff.
- Sub folders can be created for storing documents by categories.
- Copy/paste, drag and drop and email functions.
- Built-in document scanning feature (JPG or multi-paged PDF files).

If you would like to try our software before you buy, download a free 14 day trial from [tax.thomsonreuters.com.au/software-assistant](http://tax.thomsonreuters.com.au/software-assistant)

Want to see more? Schedule an online demo with one of our product experts by calling **1800 494 345**

