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ProSystem *fx* Practice Management offers enterprise-level services and is available in a tiered package for small and midsize firms. An emphasis is placed on control features to provide a secure, stable and regulated environment. This product is best placed in midsize and large firms with internal support to manage and maintain the application. However, the vendor also notes that it has a significant number of firms with fewer than 20 employees that enjoy the essentials of the Office modules, and, as their firm grows, they can grow in the software.

Ease of Use/Flexibility – 4 Stars
As with last year's review, ProSystem *fx* Practice Management's interface still can be difficult to navigate, especially when considering the needs of a small firm. In a work environment where users have specific job responsibilities,
system administrators will appreciate greater control over employee access. The application has a modularized approach, with independent programs for different
management functions. Timesheets are easily entered and have numerous tools for employees and firm administrators. Some screens present an overwhelming amount of options and information. However, billing appears to be easy with a "walk-you-through-it" approach.

Finding your way between applications is not always the easiest, and only one dialogue can be open at a time, although any module can be minimized to the

task bar. In particular, users can keep Time Entry and Contact Management open

while information can be found, it's not handed out as freely as those systems using dashboards.

Scalability/Stability — 5 Stars

After several unsuccessful installation attempts, a call to tech support finally solved my issues, and ProSystem *fx* Practice Management was up and running. If you have other SQL Server instances, especially desktop edition, make sure you use the assistance available from tech support rather than the brute force method. The software is extremely stable and can handle large volumes of data. Few firms will have concerns about database capacity, though they may need to move up from the Office Level of the suite. Because ProSystem *fx* Practice Management is a part of the ProSystem *fx* Suite, firms can readily grow into other components. Careful planning should be done if this is expected. ProSystem *fx* Practice Management fulfills the needs of appointments, time, billing, contact management and project management, but each of these are best implemented through a well-executed adoption plan, rather than hazarding a "wait-and-see" approach.

Productivity Tools/Features – 4.5 Stars

An administrative application provides linked access to the different utilities and setup actions. Time and expense entries are straightforward and include options for appointments, timers, corrections and performance analysis. The Time Entry interface also includes tabs for Alerts, an Appointment Log, and Due Dates. Alerts are notifications that previously set thresholds have been exceeded (such as time or value), and Due Dates are similar to Outlook's tasks but with direct ties to projects and client numbers. Appointments make use of a calendar and task system that ties with the individual and entities involved. A free/busy view is available for all employees. Notes can be recorded with appointments, but individual files and e-mails cannot.

Larger firms may want to take advantage of skill-level assignments and multi-

but the recently announced CCH Coolbar has extended Outlook options for linking e-mails, tasks, and appointments to entities and projects in ProSystem *fx* Practice Management. The Coolbar was not available for testing during the review process, but Aaron Seeman of CCH Customer Support noted that, "Customers will now have the ability to add time based on appointments in Outlook and can also review real-time information about their clients directly in Outlook."

Reporting – 5 Stars

In most any interface, the majority of options give access to organized data. This can make it more difficult to find a consolidated view of the information needed but easier to find nested details. Custom reports can be built through the Report Writer, and PDF and Excel versions can be output if paper copies are not desired. The Report Writer is no longer Crystal Reports driven, but will continue to generate previously developed reports. A base of about 20 report types is presented, and the Writer allows for selection of fields, column placement and previewing the initial 20 lines of the report.

Support/Help/Updates – 5 Stars

The program's installation guide offers in-depth coverage of the the upgrade process, which allows for database conversion and updating to the new SQL Server 2005 platform. In the Practice Management 2007 release, the release notes are seven pages long, detailing bug fixes, user-driven improvements and new add-ons. Previously unavailable add-ons from CPAPractice Manager are now available, including

the General Ledger and Payroll Interface. And as previously mentioned,new this year is the Internet Time Entry Add-On, which can be licensed and installed by the user. Most importantly, CCH has already made a Vista compatible release with tools specific to those users. Aaron further clarified, "We are focusing on early adopters of Vista and Office 2007 so our clients can continue to use

Practice Management without needing to run it in XP compatibility mode."

providing greater data flow and reducing redundant entry.

Relative Value – 4.5 Stars
CCH provides the most comprehensive product suite and the strongest integration with highly rated accounting tools. The target audience, detail level and administration
requirements are good for firms with more than 20 employees or those handling complex projects. Firms looking for a product that is being updated regularly and given significant attention should keep watch on ProSystem *fx* Practice Management. Our 10 timekeeper firm can license the software for $3,495. Renewal fees are 35 percent of the list price, and Internet Time Keeping can be added for $95 per user.

2007 Overall Rating: 4.5 Stars