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Oct. 01, 2008

*From the [Oct. 2008 Review](#) of  
Practice Management Systems*

ProSystem *fx* Practice Management – Office Edition is the most comprehensive application for mid-sized firms in this year's review. Providing Practice Management functionality coupled with full accounting service suite integration and remote access features, CCH is better suited to mid-sized and larger firms. However, all firms, including smaller specialty firms, may benefit from the integrated suite and from the wide selection of practice management tools for staff productivity, client and project tracking, and custom reporting.

#### **Ease of Use/Flexibility – 4 Stars**

The application is completely modularized, with distinct interfaces to the different subcomponents. While the separate interfaces require extra management, this allows system administrators more flexibility in software distribution and firm administrator control over access to application data. The Administrative Panel provides extensive workflow features for time & billing activities, controlling time entry, and making corrections to WIP and billings. An extensive amount of information can be managed under firm administration, including business leads, affiliates, and referrals, in addition to the standard employee and client management. Users may find the abundance of windowed applications (referred to as Features in the software) a bit burdensome, with inflexible modal dialogs causing some frustration when using drilldown opportunities to access client and employee details. Dual monitors would be highly advantageous with the use of ProSystem *fx* Practice Management.

**Get Special Insight into CCH's ProSystem *fx*  
Practice Management:**

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### Scalability/Usability – 5 Stars

Small firms can use this product but will likely find it more difficult to use all the components and accurately maintain their dataset. However, CCH also designed a Basic edition of the product to better meet the needs of smaller firms. Firms with active client outreach or client lead generation and conversion will most certainly benefit from the level of detail that can be tracked. ProSystem *fx* Practice Management is SQL-based and can use the SQL Server Express Edition to run from a local desktop, or from a dedicated SQL Server. It can be a fairly heavy resource user (in demo mode, the application used 300MB of RAM), but it remains a stable product.

### Productivity Tools/Features – 5 Stars

Time-keeping tools are extensive. Time and expense entry is straightforward and may be one of the more efficient methods, allowing the user to set entries and make minor modifications when saving, rather than new in-line entries. The product automatically recognizes Service Codes as being expenses or time codes, and changes the entry type accordingly. ProSystem *fx* Practice Management also provides several associated task interfaces in time and expense entry, including comprehensive time review screens for the timekeeper to gauge productivity.

A timer tool is provided, and connections to the Notes and Appointments modules are provided. Within the Appointments application, employees can manage their schedules, while firms can utilize an in/out board.

Individualized due dates are monitored, and Free/Busy time is captured with options to show time in as low as five-minute increments. Project Tracking status is built into Time and Expense entry. This allows the current status to be selected, and date entry for milestones (received, prepared, reviewed, completed and delivered).

Employee assignments can also be reviewed in the project tracking screen. The

Project Management tool provides reporting and a dashboard for existing projects

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Billing data can be sorted by multiple views to aid the process when many employees or services are provided to a particular client.

### **Reporting – 5 Stars**

New for 2008 is support for list export to Excel. Exporting no longer requires an intermediate report generation step. Reports can be generated in preview mode; saved in PDF, RTF, HTML, or Excel (\*.xls or \*.xlsx) format; or sent by e-mail as an attachment. Some reports are available in associated modules, but a dedicated reports module provides access to more than 60 reports. Reports are provided for full aspects of firm management — staff, marketing, project management and clients (all nicely separated in a tabbed view). The billing and WIP reporting is all contained in the Clients section, and there are 25 reports just related to client billings, WIP and collections. As always, firms investigating software should still verify that the reports available can meet their needs or easily be modified to do so. A report writer is also available, but this may not be as frequently used given the large amount of customization support in existing reports, such as criteria selection, sort and range features, detail by region or office, and detail by employees.

### **Support/Help/Updates – 5 Stars**

ProSystem *fx* Practice Management averages three releases per year.

The 2008 edition is largely a response to customer requests for changes to calculations,

methods and capabilities in existing tools. The product website includes a knowledge center with training resources in book, audio/video, seminar, and class format.

Twelve different classes are available for online or onsite instruction, focusing on the needs of different user types. CCH also offers training for would-be implementers. Class participants can earn CPE credit. Phone support is standard, and online support includes FAQs, downloads and access to product documentation.

## Integration – 5 Stars

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## Relative Value – 5 Stars

CCH ProSystem *fx* Practice Management is a tool designed for firms with large projects or a need for extensive information tracking. Training may be necessary for implementing firms, and should be considered in the adoption process for planning and cost. While it may feel a bit cumbersome at times, the array of tools certainly outweighs any lack of eye candy. The product is reasonably priced at \$3,700 for a 10-timekeeper license for the Office edition. A Basic edition of the software is also available for \$1,970. The annual renewal fee is 35 percent of current-year pricing, and the CCH CoolBar add-on for Office edition is \$1,595 for the first five users, \$100 per user thereafter.

## 2008 Overall Rating : 5 Stars

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