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Isaac M. O'Bannon • NOV. 01, 2009

*From the November 2009 Review of [Client Write-Up Systems](#).*

CCH Small Firm Services, which includes the ATX and TaxWise professional tax compliance suites, also offers professional accounting systems geared toward practices who offer additional services to their clients. These programs, branded with either the TaxWise or ATX name, include Write-Up, Trial Balance, Fixed Asset Manager, Payroll, After-the-Fact Payroll, and workflow and document management systems.

This review focuses on the ATX Write-Up Suite, which includes core write-up functions, full reconciliation capabilities, GL and financial reporting, plus Trial Balance, AP, AR and After-the-Fact Payroll. ATX Write-Up is a stand-alone system that can support any number of clients and offers integration with the ATX tax preparation suite and can import from QuickBooks and Peachtree. The Suite costs \$470 plus \$89 for an initial training webinar. Users can also bundle the Client Write-Up Suite with ATX Payroll for full live payroll capabilities.

#### **LEARNING CURVE & EASE OF USE-**

Although they interact and share data as needed, each of the separate modules in the ATX Client Write-Up Suite operates somewhat independently, allowing users to open different parts of the program into different clients at the same time. For instance, users can access the Write-Up center while also working with payables or receivables for another business, or even work within two separate Write-Up windows. The initial interface screens for these client-service functions appear as small popup screens that start with a client selection list that uses a check-out

process that allows users to easily access selected client data from non-networked

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For client data tasks, such as working with the check register, Client Write-Up provides a sub-window screen that includes menus for accessing related tasks, along with a spreadsheet view of account activity that includes drilldown functionality.

Users can process items in batch mode or real-time and can set up recurring journal entries or use automatic distribution of transaction amounts to GL accounts, while a financials review tool makes it easy to bring up summary and detail views of a variety of statements and reports. Data-entry fields include pull-down selection lists and calculators, along with a heads-down entry mode. Client data can also be imported. Budgeting tools allow maintaining and forecasting over multiple years, while reconciliation functions provide accurate tracking and coding of checks and credit card transactions.

The Client Write-Up Suite provides after-the-fact payroll capabilities and full compliance reporting, including federal and state forms and reports. Forms 940 and 941 can be electronically filed if the firm also has the ATX Payroll Compliance Reporting program. Firms can also add an optional Client Checkbook module for \$19.95 that provides a utility for clients to use when preparing checks, posting transactions and performing other day-to-day tasks. Professional staff can then import that client data into the Client Write-Up program and export any adjustments back into the Client Checkbook.

## **REPORTING & FINANCIAL STATEMENTS-**

Client Write-Up has a respectable library of reporting options, including trial balance and GL, ratios, budget and cash activity reports, as well as payroll-related reporting and compliance forms. The system also offers full financials, including balance sheets, income statements, balance schedules, statements of cash flows and capital reconciliation statements. Templates for reports and financials

offer customization of appearance, graphical elements, columns, orientation,

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or TaxWise compliance software, helping speed data-entry functions.

### **SUPPORT, TRAINING & HELP SYSTEM-**

Both branded versions of the program include traditional Help indexes, right-click menus, year-end guides and setup wizards, along with research functions for finding task-specific guidance. Printed user manuals are also included with the systems. Both ATX and TaxWise offer excellent online customer centers that include numerous features such as FAQs, options for CPE-eligible training, and access to ATX University or TaxWise University, both of which provide centralized online learning centers with tutorials, interactive lessons and other educational material.

### **RELATIVE VALUE-**

Although usable as a stand-alone system, the ATX and TaxWise Client Write-Up systems are at their best when used in conjunction with the professional tax compliance systems offered under those brands, allowing users to easily transfer year-end balances and other client data into a client return. The Write-Up Suite offers a good core feature set at a very attractive price, and includes trial balance and after-the-fact payroll capabilities that can help small and mid-sized firms more effectively deliver valuable year-round services to their business clients.

### **2009 Overall Rating:**

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