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Isaac M. O'Bannon • Nov. 01, 2009

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

CCH

is one of the most well-known technology providers to the tax and accounting profession, offering it's ProSystem *fx* Suite of integrated programs that cover virtually every aspect of client engagements and practice management, including tax compliance, trial balance, engagement management, document management, asset depreciation and workflow tools, along with many others.

The ProSystem *fx* Write-Up program provides full write-up, reconciliation, after-the-fact payroll, AP, AR, check writing, budgeting and forecasting, as well as integration with other applications in the ProSystem *fx* Suite, thereby helping professionals efficiently manage the processes involved in this routine client service. It has generous output functions and can produce a wide range of reports and financial statements or output data into various formats for analysis or further customization. Pricing for ProSystem *fx* Write-Up starts at \$1,850 per year but is largely dependent upon specific firm needs, staff size and other factors, including discounts.

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

The program's interface opens within a wonderfully designed and very user friendly interface with extensive customization options that let users tailor the system to their needs using simple drag-and-drop functions, including determining

menus and other features. The primary components of the program's screen

include a vertical menu that can house user-determined program shortcuts to

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format, with Excel-like features that enable filtering and sorting by columnar data, searching or other functions. Users can also utilize departments, divisions and geographic locations for organization of transactions and other data. Data entry is performed on popup windows that provide intuitive navigation and form fields.

The system's drilldown features make it easy to get into transaction summaries and detail views, as well as access to prior bank reconciliations. Its built-in working trial balance utility enables the entry of adjusting, reversing and recurring journal entries. In addition to the data import wizard, the program offers other setup features that speed data entry, including the ability to select from template charts of accounts or use an existing client's chart structure as a default for setting up other clients.

Other key features in ProSystem *fx* Write-Up include a full-time audit trail and the ability to lock periods, full live and after-the-fact payroll and wage reporting, and customizable reporting by division, department, location or other business unit.

## **REPORTING & FINANCIAL STATEMENTS-**

ProSystem *fx* Write-Up offers an impressive collection of totally customizable reports and financial statements, with the ability to create dynamic output for payroll and tax liability that automatically updates as source data changes. Users can produce full financials, including balance sheets and income statements, cash flow statements, charts of accounts, GL, trial balances, and statements of equity. Reports can be saved to Excel or PDF, or stored electronically in CCH's document management system. Miscellaneous options include more than 250 state and federal wage reporting forms, communication templates and envelope printing.

## INTEGRATION, IMPORT/EXPORT-

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## SUPPORT, TRAINING & HELP-

The customizable nature of the program makes it easy to learn and tailor to individual and client needs, while many assistive features are available, including content/task-specific Help, right-click menu options, tutorials and wizards. Program updates are downloadable from the support website, which also offers FAQs, information on training and events, and news.

## RELATIVE VALUE-

ProSystem *fx* Write-Up is ideally suited to mid-sized and larger practices offering their clients comprehensive year-round service in multiple engagement areas. The .NET platform upon which ProSystem *fx* Write-Up is built makes it incredibly customizable, while its integration with the products in the suite can be a significant productivity boost, speeding data entry, reconciliation functions, trial balance preparation and even tax compliance functions.

## 2009 Overall Rating:

Technology

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