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Isaac M. O'Bannon • Aug. 04, 2011

CCH Small Firm Services — Client Accounting Suite & Client Accounting Suite Premier

2011 OVERALL RATING ★★☆☆☆



BASIC SYSTEM FUNCTIONS



CORE WRITE-UP FEATURES



REPORTING & FINANCIAL STATEMENTS



IMPORT/EXPORT/INTEGRATION



HELP/SUPPORT SYSTEM

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and Practice Management users are supported with a special integrated version, Client Accounting Suite Premier.

Strengths:

- Simple interface with strong small business software import
- Integrates with ATX & TaxWise tax and workflow systems
- Includes trial balance utility
- Flexible templates & financials reporting with bilingual capabilities (English/Spanish)

Potential Limitations:

- No bank statement import for reconciliation
- No client portal or collaboration tools
- Basic check writer functionality

Summary & Pricing

Client Accounting Suite is geared toward management of generally smaller business entities, but the program's features, particularly in batch processing of journal entries, recurring entries, ratios and its financial statement generation functions, are adept for virtually any business' needs. The program is best suited to users of ATX and TaxWise, offering solid integration and data transfer into those tax packages, but can be used as a standalone write-up utility, as well. Client Accounting Suite costs \$520 for a site license usable by all in the practice. Client Accounting Suite with the live payroll option costs \$795.

Product Delivery Methods

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Reporting & Financial Statements 4

Import/Export/Integration 4

Help/Support System 4.75

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