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**CCH, a Wolters Kluwer business — ProSystem *fx* Practice Management**  
**800-739-9998**  
[www.cchgroup.com](http://www.cchgroup.com)

From the [July 2012 review](#) of Practice Management Systems.

**Best Fit:** Accounting firms of all sizes currently utilizing other ProSystem *fx* desktop solutions or firms looking for a standalone practice management solution

### **Strengths**

- Fully contained solution, without the need for purchasing additional modules
- Fully customizable to meet the needs of firms of all sizes and client focus
- Strong reporting options including ability to automatically run reports
- Driven by dashboards for each user level

### **Potential Limitations**

- Native integrations are limited
- SaaS solution available, but currently only works with fellow SaaS products and not desktop solutions

ProSystem *fx* Practice Management is part of the ProSystem *fx* Suite from CCH. Built solely for accountants, ProSystem *fx* Practice Management is offered in three tiers, Basic, Office and Enterprise. The core functions of all three levels are identical. The Basic Edition is limited in reporting capabilities compared to other editions and does not include budgeting or client marketing tracking capabilities. The Enterprise Edition is intended for larger organizations and is reliant on the Microsoft SQL

platform. The following review focuses solely on the Office Edition of ProSystem *fx*

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position with a typical accounting firm.

ProSystem *fx* Practice Management has integrated tools that provide users with a suitable customer relationship management system. Nearly any type of client contact data may be entered and tracked within ProSystem *fx* Practice Management, including prospective client data. The included client dashboard can be set to show detailed contact and billing information about each client and allows for direct emailing capabilities. When sending batch emails, ProSystem *fx* Practice Management automatically includes client email addresses in the BCC field to ensure adequate privacy is maintained.

## **TIME MANAGEMENT CAPABILITIES**

ProSystem *fx* Practice Management features an intuitive time entry screen. Users simply enter the client name and the appropriate service code. All time posted is immediately available for billing purposes and the screen details the billable, non-billable and total time posted for the current day. Employees may also view their time entry through a calendar view to ensure that appropriate time is posted for each day worked. Time may be entered in batch for multiple employees by those with adequate user rights. Timers are available and run as a separate program. Multiple timers may be running simultaneously and users may enter basic time entry information that will automatically be imported into ProSystem *fx* Practice Management.

Project tracking is included with ProSystem *fx* Practice Management and allows full customization in the setup of each project. Project templates may be setup as detailed as necessary to meet firm needs, though more detailed project setup will generally result in better reporting capabilities. All project templates created may be attached to clients individually or in batches and may be set to automatically generate upon changing to a future time period.

## INVOICING FUNCTIONS

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and prepayments may be applied at any time. ProSystem *fx* Practice Management also will generate deposit slips based on current payments received and print out a deposit slip with the appropriate MICR encoding.

## MANAGEMENT FEATURES

ProSystem *fx* Practice Management includes several dashboard views for managers and partners. Several additional dashboards are currently in development and will be included in future releases. The manager and partner level dashboards allow quick access to client accounts receivable data. Alerts may also be set to notify partners or other staff of upcoming due dates, any time budget issues or WIP hours and cost levels exceeding predetermined thresholds.

All staff may be assigned user rights and are limited in viewing data within the system as appropriate. Each staff member has a dashboard that can be customized based on user rights and shows all projects currently assigned. Staff members also have access to an In/Out board to determine current staff availability.

ProSystem *fx* Practice Management has strong reporting capabilities and allows for fully custom reports based on firm needs. The included report writer can create and modify virtually any report and all generated reports may be exported to Microsoft Excel or PDF formats. Reports may be grouped together and report cues can be set to automatically generate reports and forward to staff and clients via email.

## INTEGRATION & DATA MANAGEMENT

ProSystem *fx* Practice Management integrates directly with ProSystem *fx* Tax. Upon selecting a tax return project, ProSystem *fx* Tax is launched and the appropriate client file is opened. A timer may also be set to automatically start upon launching ProSystem *fx* Tax. Any changes made to client contact and address information is

automatically synched between ProSystem *fx* Practice Management and ProSystem *fx*

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CCH provides a variety of help and support options for ProSystem *fx* Practice Management. Traditional help is available from the drop-down menu. Direct links are also available for web, chat and email support. Telephone support is also offered. A searchable online knowledgebase and downloadable program updates are provided through the ProSystem *fx* Suite website hosted by CCH. All mentioned support options are included with the annual license cost of ProSystem *fx* Practice Management. Supplemental training is available for additional fees and includes on-demand web training, onsite training, virtual online assistance and other specialized training options.

## SUMMARY & PRICING

ProSystem *fx* Practice Management provides an effective platform for managing time, expense and project management within accounting firms. Built on top of a sturdy database, ProSystem *fx* Practice Management can handle needs of firms of all sizes and client focus. The Office Edition is priced around \$3,500 for a 5 user license. Additional users may be added at \$220 for each user. The Basic Edition is priced at \$770 for 2 users. Annual renewals are priced at 35% of original purchase price and include all support options.

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