Formerly known as Visual Client Write-Up, this client write-up accounting program has been re-branded following sale of its owner, CPASoftware, to Best Software. We all know Best as purveyor of Peachtree, BusinessWorks, MAS 90, MAS 200, MAS 500, ABRA HR Payroll, ACT!, FAS, and MIP Fund Accounting, to name a few. Through its purchase of the former Visual suite of programs, Best has served notice that it plans to be a force in the professional accountant's software marketplace.

CPAClient Write-Up consists of a general ledger, after-the-fact payroll, financial reporting, trial balance and bank reconciliation. The program offers a unique approach to entry of once-a-year client-supplied trial balances from business clients that is intuitive, faster and more efficient than anything I have experienced. This is a profitable tool.

CPAClient Write-Up is full featured, and it works, which is exciting news for the Windows desktop where we have had few real players. Ready for prime time, we put CPAClient Write-Up support to the test. We took our observations and questions the extra nine yards during a recent CPASoftware product walkthrough. My "class" was in a

web-enabled, state-of-the-art classroom.

the cost is the same for a five-user system. Support is $775 a year, and a three-hour web training class is $295.

LEARNING CURVE & EASE OF USE – 5 Stars
CPAClient Write-Up offers comprehensive and flexible client setup. Conversion of data files from many products are available – too many to list, in fact. Data entry is intuitive, smart & definitely "heads down." The learning curve is fast, which I did not expect. The interface is pleasant, easy on the eyes, and logical with a familiar feel. My hands-on experience begged the question, "Haven't we met before?" The fact is, I had never seen Visual Client Write-Up or CPAClient Write-Up before. D?j? vu. Perhaps it was in a prior life.

REPORTING & FINANCIAL STATEMENTS – 4.5 Stars

The flexible financial report writer puts the user in control. An adequate supply of "canned" financial

templates accompanies the system.

is also available. Pretty cool.

INTEGRATION, IMPORT/EXPORT & PRODUCTION PROCESSING – 4 Stars
This program integrates with CPAPayroll, CPAAccounts Payable, CPADepreciation, CPADocument Manager, and CPAPractice Manager. It imports data from CPAClient Checkbook, Peachtree, QuickBooks, Quicken, MAS90, FAS, an ASCII file specification import and ATB. It exports tax data to Lacerte, ProSystem fx Tax, and ProSeries. CPAClient offers no support for batch printing of multiple clients.

SCALABILITY & PORTABILITY – 4.5 Stars

CPAClient is programmed to take advantage of advanced Microsoft Windows operating system features. Network support requires Windows 2000 or higher. One workstation must be running Access 2000 or Windows XP to support the client database.

SUPPORT, TRAINING & HELP SYSTEM – 4 Stars
Comprehensive context-sensitive help is available throughout CPAClient Write-Up. Product demos are available on CD and online through Runaware.

Support is free for the first six

A new user who's been using the program for about one and half years told us that "installation was very easy, and so was the learning curve. Overall, our 10 partners are very happy."

Other users told us the following: Overall, we're very satisfied with program; it's excellent. Their tax product is going away. Clients in the field (with companion products) are very satisfied. Support is good but needs to have longer hours for west coast users. It has a very short learning curve. We had to be trained for the financial statements; they were cumbersome.

2004 OVERALL RATING: 4.5

The choice of a write-up program should be based in large part on identifiable attributes of the write-up program that best fits the sum of the individual needs of the practice. In no particular order, factors that lead to the sum include **setup & learning curve; training & support; program pricing & cost of updates; data conversion, maintenance & storage; efficiency & flexibility; and integration with a practitioner's other programs** (tax, payroll, analysis, word processing, etc.). Finally, throw in a wild card ' the practitioner's overall dedication to technology.

Technology

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us