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# Sage Software/CPASoftware Division — CPAClient Write-Up

800-272-7123 [www.SageSoftware.com/CPASoftware](http://www.SageSoftware.com/CPASoftware)

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CPAClient Write-Up consists of general ledger, after-the-fact payroll, financial reporting, trial balance and bank reconciliation. Among its many abilities, CPAClient Write-Up offers a unique approach to entry of once-a-year client-supplied trial balances from business clients. It's intuitive, faster and more efficient than anything I have experienced — a very profitable tool.

CPAClient Write-Up is full-featured, and it works. Ready for prime time, I put CPAClient Write-Up support to the test. My request for a product walkthrough was met with open arms. "Class" was conducted in a web-enabled, state-of-the-art online classroom. The CPASoftware staff consistently offered friendly, knowledgeable, and enabled "I can" responses.

Shaun T. Powell, CPA, CMA, CFM, is the controller for GBQ Holdings LLC ([www.gbq.com](http://www.gbq.com)),

the largest locally owned practice in Columbus, Ohio, with over 60 professionals. Powell says, "The most beneficial aspect of the program to me is the ease in which it could be interfaced with CPAPractice Manager and AP." The firm underwent a conversion to CPASoftware's Write-Up, AP and Depreciation modules in 2003 since they already utilized CPAPractice Manager.

### **LEARNING CURVE & EASE OF USE — 4.5 Stars**

CPAClient Write-Up offers fast, comprehensive and flexible client setup. Conversion of data files from many products is available — too many to list, in fact.

Data entry is intuitive, smart and definitely “heads down.” The learning curve is fast, and the interface is pleasant and easy on the eyes.

Data entry is logical and has a good feel to it. Powell advises new users to use “the demo companies provided in Write-Up to better understand various features, such as how the account masks work, the consolidation modules the report writer uses for financial statements, and the various posting processes.”

### **REPORTING & FINANCIAL STATEMENTS — 4 Stars**

The flexible financial report writer puts the user in control. An adequate supply of “canned” financial templates accompanies the system. Custom financial reports are created utilizing a “row-and-column” methodology that is quickly assimilated by the user, first-nature. Custom statements are available for sharing between clients. Support for consolidations, departmental and budgetary reporting is included. Drill-down support to source entry — that’s way cool!

### **INTEGRATION, IMPORT/EXPORT & PRODUCTION PROCESSING — 4.5 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 (including automatic support for Pfx tax line assignments), and ProSeries. CPAClient Write-Up offers no support for batch printing of multiple clients. The company has added quite a few integration features, imports and exports. This includes the ability to import and export data involving sister applications MAS 90 and Peachtree, and to QuickBooks, allowing the accountant to make correcting journal entries and export them back to the client.

### **SCALABILITY & PORTABILITY — 4.5 Stars**

CPAClient Write-Up is programmed to take advantage of advanced Microsoft Windows

operating system features. Network support requires Windows 2000 or higher, while one workstation must be running Access 2000 or higher to support the client database.

## **SUPPORT, TRAINING & HELP SYSTEM — 4.5 Stars**

Comprehensive context-sensitive help is available, and product demos are available on CD and online through Runaware. Support is free for the first six months of program ownership, and priority support is offered to new users for the first 60 days of program ownership. Hands-on training is offered in physical or virtual (web) classrooms, and traditional (toll-free) telephone support is available. Powell says CPASoftware's technical support "has been very helpful and very easy to work with." In 2004, Powell's firm decided to split into five separate legal entities with one parent holding company and four subsidiaries.

"This required a 'split' of our existing database into three pieces as well as a consolidation routine once completed," Powell explained. After discussions with support, the firm closed its year-end on January 13, and sent the CPAPractice Manager database along with processing instructions to CPASoftware on January 14. "CPASoftware returned the database to me on January 19, and we were operating as five separate companies on January 20, with all accounts reconciling perfectly."

## **2005 Overall Rating — 4.5 Stars**

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