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Aug. 29, 2006

From
the September 2006 Review of Client Write-Up Systems

Last year, we reported to you on CCH's ProSystem *fx* Write-Up, a brand-new write-up application that had just been brought to market. However, late in 2005, CCH announced the acquisition of Sage Practice Solutions, which had only just been renamed. This added the former Sage CPAClient Write-up product to the ProSystem *fx* line of software. The staff of CPAClient Write-up was retained, and CPAClient Write-up will be supported and regulatory updates will be released through 2007. A seamless conversion from CPAClient Write-up to ProSystem *fx* Write-up (including all the great features of CPAClient Write-up) will be available mid-year 2007. CPAClient Write-Up consists of General Ledger, After-the-Fact Payroll, Financial Reporting, Trial Balance and Bank Reconciliation. CPAClient Write-Up is intuitive, fast and full-featured. ProSystem *fx* CPAClient Write-Up starts at \$1,850.

As usual, I put CPAClient Write-Up's support team to the test. My request for a product walkthrough was met with open arms. This "class" was conducted in a web-enabled, state-of-the-art online classroom. The support staff provided knowledgeable and program-enabled "I can" responses.

LEARNING CURVE & EASE OF USE: 4.5 Stars

CPAClient Write-Up features comprehensive, flexible and fast client setup.

Conversion

of data files from many products is available. Data entry is logical, intuitive, smart and "heads down." The learning curve is fast, and the user interface is quickly learned and easy on the eyes. This builds user confidence, allowing users to quickly get things going.

REPORTING & FINANCIAL STATEMENTS: 4 Stars

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INTEGRATION, IMPORT/EXPORT & PRODUCTION PROCESSING: 4.5 Stars

CPAClient Write-up integrates with CPAPayroll, CPAAccounts Payable, CPADepreciation,

CPAAccounts Receivable and CPADocument Manager. It can import data from CPAClient

Checkbook, Peachtree, QuickBooks (allowing the accountant to make correcting journal entries and export them back to the client), Quicken, Sage MAS90, FAS, ATB and an ASCII file specification import. The program exports tax data to ProSystem *fx* Tax programs (including automatic support for ProSystem *fx* Tax line assignments), Lacerte and ProSeries. CPAClient Write-Up offers no support for batch printing of multiple clients.

SCALABILITY & PORTABILITY: 4.5 Stars

CPAClient Write-Up was designed to take advantage of advanced features of the Microsoft Windows operating system. Network support requires the Windows 2000 (or higher) operating system. One workstation must be running Microsoft Access 2000 in support of the client database.

SUPPORT, TRAINING & HELP SYSTEM: 4.5 Stars

CPAClient Write-Up offers comprehensive context-sensitive Help, and product demos are available online or via CD. One full year of support is included in the price of the software. Support is included in a yearly maintenance fee following the initial purchase, which includes all program updates. Hands-on training is offered in physical or virtual (web) classrooms, and via traditional toll-free telephone support.

2006 Overall Rating: 4.5 Stars

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