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ProSystem
fx Practice Management from CCH, formerly a CPASoftware product from Sage, is a recently added toolset to the ProSystem *fx* suite. Now available in basic, office and enterprise editions, ProSystem *fx* Practice Management delivers a comprehensive package that is affordable and manageable for firms of all sizes. This is a strong product with roots in the 1990s, and its interface could use some updating. Still, CCH continues to provide a multitude of updates.

Ease of Use/Flexibility — 3.5 Stars
On a function-by-function basis, users will likely have no problem doing what needs to be done. Finding information regarding clients is self-contained in the Contact Management screen. Time entry is fairly easy, and numerous options are available in billing and invoicing for generating appropriate bills on demand.

My gripe? Each process operates in an independent window, hosted by a unique application, each with its own resource requirements. Most any modern workstation can handle the load, but it could be a problem for firms switching to thin-client and terminal models. I found navigation between tasks and processes to be cumbersome,
and locating the appropriate screen for data entry was occasionally frustrating. As noted, the software can handle the data and workload of any size accounting firm. Basic users have reduced functionality, while Enterprise users only gain a SQL Server database over Office version users.

I was very impressed with the number of ways that information can be found

noted, firms have the opportunity to select from three versions, with the Office version providing all available features on the MSDE platform. Project and document management components are both available, and I'd recommend that a firm start using these features immediately. No stability problems were noted, though the separate feature-based applications could cause issues on some workstations and terminal server setups.

Productivity Tools/Features — 4.5 Stars
ProSystem *fx* Practice Management – Office Edition supplies the necessary tools to track projects, set employee schedules, generate invoices from time and expense entries, and store client invoices. An add-on is available for Internet-based timekeeping. Scheduling and appointment entry is flexible with multiple views, and is entirely independent of other scheduling products. Free/busy availability is given at the employee level, and due-date monitoring with tasks can be set up for client projects. Outlook synchronization is also available.

Report writing is simplified through the new custom report builder. Users have control over layout, sorting and data inclusion. The ability to preview layout, select an existing report type, and have control over positions makes the process very easy. More than 50 pre-built reports are available in the report module, with a particular emphasis on clients, employees and cash flow. Other useful tools include a comprehensive CPE tracker, numerous bill rates per client, the client management toolkit, and CRM capabilities for referral/lead/affiliate tracking. Research tracking tools are not available.

Reporting — 5 Stars
As noted above, reports can be filtered in many different ways, and detail level can sometimes be selected. Data inclusion (fields, summaries) is at the user's

discretion. As well, a number of different period-based reports are available

during tax season, which is an important consideration for firms with high workload
and no downtime available from January to April. Updates are published twice annually, once in a mid-year release, the second as a "regulatory release"
in December. Any other changes are published in distributed hot fixes as necessary.

Integration — 3.5 Stars
ProSystem *fx* Practice Management integrates well for most businesses. ProSystem fx Tax integrates by way of the Tax Client Link, which allows for basic contact mapping (similar to the client linking for CPAAccounting) and automatic time tracking. Contact database synchronization to Outlook can be set up, as well. Integration is just for contacts.

Relative Value — 4 Stars
At a cost of $280 per user, a 10-timekeeper firm could have the fully functional Office Edition for less than $3,000. Renewal fees are set at 35 percent of the current year's fees. Compared to other suites available, this product
is probably best suited to two types of firms: large firms that have the administration support available to maintain and operate such a product or small firms that can appreciate the segregation of workflow tasks in the interface. With an emphasis on providing quality support for write-up and tax-based firms, ProSystem *fx* Practice Management can especially serve current ProSystem *fx* users well.

2006 Overall Rating: 4.5 Stars

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