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CCH, a Wolters Kluwer business — ProSystem fx Write-Up

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*From the Nov. 2007 [Review of Client
Write-Up Systems](#)*

ProSystem *fx* Write-Up is one of CCH's newest additions to the *fx* product line of tax and workflow management systems for professional accounting practices, providing powerful financial statement preparation, bank reconciliation features, trial balance, options for integrated or online client payroll processing, integration with other ProSystem *fx* programs, import capabilities from most accounting packages, and export to tax preparation and document management applications. The system supports limitless client companies, with fully customizable charts of accounts and journals, and offers extensive customization options for financial statement and report preparation. Conversion from other packages is offered, and is free for users of CCH's CPA Client Write-Up. Pricing for ProSystem *fx* Write-Up starts at \$1,850.

LEARNING CURVE & EASE OF USE — 4 Stars

CCH created ProSystem *fx* Write-Up from the ground up on the .NET framework only a couple of years ago, and this is immediately evident in the program's advanced interface and outstanding integration functions. The primary windows provide traditional pull-down menus, but throughout the program users have one-

click

access to pretty much all related features. Write-Up offers a customizable Shortcuts menu, with a tabbed work area that also offers personalization features. Awesome customization options are everywhere in the program, with drag-and-drop access to drilldown features and data-entry processes that allow tailoring of data-entry grids to match workflow needs. Users also have the ability to customize departments, divisions and locations.

Entry of client data is most easily performed using ProSystem *fx*

Write-Up's Import Wizard, which lets users quickly pull and convert client data directly from Write-Up CS, QuickBooks, Peachtree, Quicken, ASCII files or the Windows Clipboard. Integration with other programs, including after-the-fact

and live payroll, allows data to flow directly to appropriate account ledgers.

Manual data entry is also flexible and easily performed. Bank reconciliation functions provide access

to prior reconciliations, with tabbed screens showing outstanding checks, outstanding deposits, other receipts, reconciling items, and status, and then clearly presenting bank and write-up reconciled balances. The program also maintains

a working trial balance that tracks adjustments made to client data and provides automatic on-screen updates with the adjustments displayed. Write-Up also provides

filtering functions that enable professionals to quickly find and answer client and vendor questions, such as when payments were posted to an account. The vendor

offers after-the-fact payroll as part of the base write-up program as well as an integrated live payroll module and integration with PayCycle. The payroll options provide for electronic or paper-based information return preparation and filing, as well as support for state forms.

REPORTING & FINANCIAL STATEMENTS — 5 Stars

Reporting and financial statement preparation processes are guided by a reporting wizard that simplifies filtering and sorting of information for building customized reports, client letters and financial statements, and enables the creation of comparative financials for analysis. Subsidiary reporting is easily performed, as is the creation of consolidated reports. Reports can be output to Excel or exported to ProSystem *fx* Engagement or Trial Balance.

INTEGRATION, IMPORT/EXPORT — 5 Stars

ProSystem *fx* Write-Up's Import Wizard eases data acquisition from QuickBooks, Peachtree, Quicken and ASCII files. Dynamic links between the write-up system and ProSystem *fx* Tax make return preparation more efficient by directly routing data to 1120, 1120S, 1065, and 990 returns, as well as to Schedules C, E and F. Statements and reports can be saved to PDF format for paperless document management purposes, or opened in Excel for further data analysis.

SUPPORT, TRAINING & HELP SYSTEM — 5 Stars

ProSystem *fx* Write-Up offers excellent content-sensitive Help functions, right-click menus, tutorials, and links to support, along with a comprehensive online support center that provides FAQs, program updates, and links to a variety of web-based and live training options. Phone support is also included in program pricing.

RELATIVE VALUE — 5 Stars

As the newest entry into the market, ProSystem *fx* Write-Up's .NET platform makes it amazingly customizable and enables it to have best-of-class integration capabilities that can pull data from virtually any client accounting system on the market. Because of dynamic linking between programs, however, Write-Up is best suited to firms that utilize other applications in CCH's ProSystem *fx* Office suite, especially the company's tax, engagement, depreciation and document management systems.

2007 Overall Rating: 5 Stars

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