From the October 2005 Review of Mid-Range Accounting Software

CPA Practice Manager includes time and expense entry, client and project management
and a large selection of pre-sorted lists for reporting. The software was designed for mid to large-size firms, but can easily be adapted for small firm use. Many firms will benefit from the numerous means to access information, though the interface may feel cumbersome at first.

Wanda Hooper is the office manager at Modesto, California-based Grimbleby Coleman CPAs, Inc. (www.grimbleby-coleman.com),
a 30-employee full-service accounting firm that has used this vendor's practice management and accounting software for at least 20 years, from Unix to DOS and now Windows. "We have been a beta test site and worked with the programmers on features to enhance or add, most of which have been done," she said. "This was before they became a part of Sage, but many of those people are still with the company, which I feel shows it is good and solid."

Hooper says the program has good reporting for managing their firm, is user friendly with many capabilities, and offers great project management features. She advises prospective users to put a lot of thought into service code structures if starting new and to plan the transition or implementation at a time when it is not busy in order to learn the program and train staff: "I highly recommend using the Sage training programs and especially having anyone doing the billing attend training in this area as it has so many features and shortcuts that are not obvious to speed you through keying billing. It takes time to learn it all, so be very patient and have staff share their findings with others."

Ease of Use/Flexibility — 4 Stars

Time entry is extremely easy, and timers can be set directly from the time and expense entry tab. Multiple timers can be set up and run simultaneously. Appointments can be set with the Appointment interface, and each new appointment can be tracked in six different categories. Notes can be kept with each appointment, and color-coding is available for the different meeting types. Data is updated in real-time across a SQL server connection. Hundreds of lists, sort/filter methods, and reports are available, and the database appears to be quite robust. Firms that collect and enter data about their clients and projects will have access to a wealth of information over time that can be readily accessed and used.

Client codes can be customized, making it unnecessary to have fully sequential listings of clients. Billing codes are created under specific user categories, such as Audit, Tax and Expenses, and subcategories can be created beneath that. Improvement is necessary to create intuitive forms for handling billing processes when compared to major competitors in this review. However, functionally, the product does support multiple methods of time entry, approval of time from multiple parties and a bill review process. No limits were found for the number of clients, timekeepers or projects. The "Quick Setup Guide" provides a roadmap for firms to follow when installing the software, though the process itself is quite extensive.

Scalability/Stability — 3.5 Stars
CPA Practice Manager is designed to be robust enough to handle larger firms. Sage Software offers a Time & Billing Edition for smaller firms that do not require the functionality of a full practice management system. The SQL database back-end has been known for high stability. Dedicated firms with rigorous training will be up and running in a matter of days, though only with extensive

planning and preparation. Luckily, Sage Software provides multiple training

views are also available. The due-date view provides relevant information about each task with the ability to change date listings and status of each entry. A timesheet lookup provides both the timekeeper and management with an overview of how the employee has spent their time during the specified reporting period. A report is available to assist in scheduling multiple employees, and an in/out log allows employees to notify others of their present status around the office, which is a really useful feature provided employees are honest. I noted that users can possibly enter nonexistent times such as "Back At: 4:65 p.m."

A notes section is provided for recording correspondence as notes or items for follow up, with the option of tagging the item as a marketing tickler. Each record can denote if it refers to an e-mail, phone call, fax or other contact, though no ability to append files exists, which would be useful for scanned faxes or the original e-mail. The contact manager includes numerous lists regarding referrals, leads and business affiliates. This can be a valuable tool for those firms that provide training for local businesses or regularly attract potential clients at fairs and conferences.
Certain features such as integration with Palm-enabled devices allow for remote time entry, and a web time entry product is available as an add-on module for remote time entry. Remote installations are possible, and a basic export/import process allows for the sharing of data between home and branch offices.

In the way of document management, invoices and statements can be archived without the use of any additional tools, but for advanced document management you'll need to purchase add-on modules. Research tools are also not included. Project Management, however, is rather thorough. Templates for projects can be created, and teams can be set up for assignments. Customizable fields are available for projects, giving management the ability to better define projects and associated tasks. A wide range of status-tracking labels can be assigned, and lists are again available for sorting and viewing ongoing projects. New

information
about profitability, billing status, project status and due-date monitoring. Firms with devoted marketing staff will appreciate the section devoted entirely to marketing reports. As well, Hooper notes that it's "easy to export anything to Excel, and databases can be pulled into Access for special reporting."

Support/Help/Updates — 4.5 Stars
In speaking with support representatives, the company is listening to customer feedback and incorporating such into its upcoming Sage Practice Management product.
This product is expected to provide a new look and feel for complete Practice Management software, the newest application in the Sage lineup, and will address custom reporting with a new tool based on Crystal Reports. The company has always been known to provide useful support and regular updates for its products. The built-in Help system is antiquated and provides limited assistance, but the newest version of help tools will be available in the forthcoming Sage Practice Management product. No documentation was provided for this review, though the Quick Setup guide is included in Help, and is an extremely thorough manual.

Integration — 4.5 Stars
A variety of tools has been integrated into CPA Practice Manager. Palm handhelds can be used for remote time entry, and Outlook can be synchronized with the contact manager. CPA Practice Manager is one part of the CPA Software suite that includes write-up software, document management, payroll, accounts payable, and accounts receivable. CCH ProSystem fx Tax can be integrated as a tax tool, and bridges are available to Lacerte and ProSeries. Integration is also available with all of the MAS products and Abra.

Relative Value