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CCH's

ProSystem *fx* Suite of professional tax, research, accounting and engagement management programs is one of the most comprehensive on the market, providing total integration between virtually all programs that a professional firm uses for client services or internal management. The Suite's Practice Management program delivers on this last aspect, offering extensive time and billing functions, contact management, project management, its own AR, client communication tools, and even prospect and referral tracking. Additionally, the program offers abundant tools for managing business productivity. ProSystem *fx* Practice Management is available in three versions, with the basic system starting at \$1,190 for a five-user license. Versions are also available that utilize Microsoft SQL and SQL Express.

From the June 2009 Review of [Practice Management Systems](#)

EASE OF USE/FLEXIBILITY:

If implementing one of the SQL Server-based versions, the administrator will need to be familiar with SQL database technologies during setup of the program. Each of the various components of ProSystem *fx* Practice Management opens independently: These include AR, Administration, Contact Management, Billing & Invoicing, Custom Library, Project Management, Project Tracking, Practice Management, Reports and Time Entry.

ProSystem *fx* Practice Management's interface provides excellent navigation features and crisply designed screens, with data-entry functions

that are generally easy to understand, with customization features that enable

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PRODUCTIVITY TOOLS/FEATURES:

ProSystem *fx* Practice Management offers good project and group time tracking capabilities that provide productivity analysis by client, tasking and staff, with client contact information easily available, along with due date tracking, budgeting and milestones. The system also provides good options for managing non-billable time such as for training purposes or tracking CPE. The program's Administration module includes many useful client management and marketing functions, including access to reporting, referral and prospect tracking, and client communication tools that can be used to produce mass emails, labels and letters. The built-in AR includes options for electronically invoicing clients through integration with email. ProSystem *fx* Practice Management also provides the ability to set user access rights, providing for good security.

The system also offers good business management features, including data analysis functions that can dig into time and expenses, invoicing, collections and employee data. Additionally, summaries of key business data are available with a few clicks.

Another notable function is the integration of employee self-service functions into the time and expense entry screens. Since employees are already managing their time via timesheet entry, only a few additional steps allow them to track their unused leave time. Available add-ons to the system include Internet Time Entry for remote access and a Custom Library subscription services that offers greater firm analysis features.

Users can also add the CCH Coolbar, a feature that gives quick access to information in the Practice Management system while working in Microsoft Outlook. This includes

contact lists, client details, WIPs, timesheet entries, financial information

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functions specific to billing and WIPs are accessed via client functions, providing quick access to summary and detail options.

INTEGRATION:

Although it can run as a stand-alone program, Practice Management is at its best when used in conjunction with other applications in the ProSystem *fx* Suite, with full integration between it and programs for tax compliance, write-up and other tools. The CCH Coolbar add-on offers integration with Microsoft Outlook for time entry and views of contact information.

SUPPORT/HELP/UPDATES:

Practice Management includes many assistive features and an ample Help utility. For users to get the most out of the system's capabilities and customization options, some form of formal training is probably advised. For many firms, this can be provided by in-house staff members who already have experience with the program. The company also offers CPE-eligible web and live training options. The vendor's website offers a broad collection of Help tools, including downloads, FAQs, product documentation and access to the CCH University. Technical support is included in program pricing.

RELATIVE VALUE:

The CCH ProSystem *fx* Practice Management system is quite comprehensive and best-suited to mid-sized and larger practices offering services to a diverse client base. The program is at its best when integrated as part of the ProSystem *fx* Suite, providing excellent timesaving features in collaborative environments, along with managerial supervision of key business indicators. Other add-on enhancement applications from CCH include IntelliConnect and CCH@Hand,

which integrate Word, Excel and PowerPoint files for tax research; and XCM

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