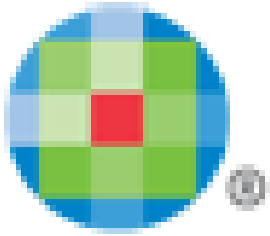


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Practice Management on the Microsoft Access database, but has been updated to support the Microsoft.net and Microsoft SQL Server platforms.

Brian Tankersley • Apr. 21, 2014



Wolters Kluwer
CCH

Basic System Functions: 4.5 Stars

ProSystem *fx* Practice Management was originally built as CPASoftware Visual Practice Management on the Microsoft Access database, but has been updated to support the Microsoft.net and Microsoft SQL Server platforms. The application has been updated for Windows 8 compatibility, and is managed through a series of customizable dashboards built in the product. The application includes a report writer as well as a wide range of preconfigured reports.

Time Management Capabilities: 4.5 Stars

ProSystem *fx* Practice Management offers a simple data entry screen for all kind expense injuries. Users can customize the columns on the data entry screen as well as how they are displayed on-screen. The application uses auto complete extensively to narrow down search results when selecting client projects and tasks.

The application includes project management features which are driven through

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by default firm formats their customers through the built-in editor. The editor provides a significant amount of flexibility in how the invoice is formatted so that it can be consistent across the firm.

The application includes built-in timers which can be used to automatically track time as a staff person works on a task. Partners and employees can use more than one timer simultaneously so they can easily capture the time used by interruptions like phone calls and quick status conversations without having to close out the primary timer for their active work tasks. The timers can be automatically populated with service codes clients and projects, thus avoiding the need to accurately enter these labels into the software.

Accounts receivable, payments, credit memos, and out-of-pocket expenses are tracked within the application. The software supports printing deposit slips with MICR encoding for use with daily deposits.

Management Features: 4.5 Stars

ProSystem *fx* Practice Management includes a wide range of prepackaged reports as well as a built-in report writer to generate custom reports. We like the fact that CCH includes an old-school PDF reports manual with the default installation so that we can easily see the report layouts. All reports can be exported to Microsoft Excel, Adobe PDF, or printed on paper. The application includes extensive dashboard interfaces for each job function, including productivity, profitability, and quick access to accounts receivable and unbilled fees. Due date tracking is also available, and alerts can be used to manage the allowable amount of WIP in a project.

CCH also offers ProSystem *fx* Practice Intelligence, which is a business analytics system designed to extract data from the company's application software for accounting firms. This solution is a customized midmarket business intelligence

application which was configured by a top 100 firm for their own use, and has been

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installation of Microsoft Outlook. Payroll integration is possible with Sage Abra Payroll. There are not many other supported integrations, so users who need to import and export data between multiple applications may require custom programming to accomplish their desired tasks.

Help/Support: 4.5 Stars

CCH is a very capable training and consulting group which helps install configure and train users on the use of ProSystem *fx* Practice Management. This organization offers web-based training, custom in-house training, and self-study manuals for all different levels of users. There is a well-documented help file as well as a web-based knowledge base listing common issues associated with the application. Telephone support is provided as part of the annual maintenance and renewal process. Training is generally not included with the software unless negotiated with the sales rep.

Summary & Pricing

CCH ProSystem *fx* Practice Management is priced starting at \$855 for the basic edition, with significant discounts available for large firms as well as those who use multiple CCH products.

Best Fit: Mid-sized and larger firms who use multiple components of the ProSystem *fx* Suite for accounting professionals and their firms.

Strengths:

- The ProSystem *fx* Practice Management application has had a long history across multiple vendors, including CPASoftware, Sage, and CCH, and has existed in some form for at least 15 years.
- The application supports dashboard reporting, and is stable and scalable to firms of all sizes.

- Although this application is the legacy application, it still has a good feature set,

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CCH, Sage 100 ERP, and Sage 500 ERP, which may be limiting to many firms.

- The solution does not have comprehensive scheduling tools although these are available from third parties for a separate charge

2014 Overall Rating: 4.5 Stars

Firm Management

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