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CCH offers a broad suite of applications for professional accountants, from fully integrated client service programs for tax compliance, asset management, tax planning, trial balance and write-up, to systems designed for internal firm management of engagement processes, paperless document management, tax workflow, research and audit tools, as well as the core ProSystem *fx* Practice Management program reviewed here. Late last year, CCH introduced a new SaaS platform, its "Next Generation" version of the ProSystem *fx* Suite, which provides hosted versions of the vendor's integrated tax compliance, document management, practice management, client portals and workflow management systems. The SaaS version of the practice management system, titled ProSystem *fx* Practice, incorporates Smart Client features and hosted benefits with reduced IT and infrastructure requirements. This review primarily focuses on the installed version, but also points out some of the comparative features in the Next Generation SaaS version.

Basic System Functions

ProSystem *fx* Practice Management is a comprehensive practice management program, with built-in advanced time and billing capabilities and accounts receivables management, contact management/CRM functions, calendaring, analysis, project management and extensive client communication and workflow tools. With a SQL Server based backend, the program offers deep database capabilities and the ability to scale to the needs of virtually any size accounting practice.

The program also offers numerous additional features, including alerts for deadlines,

management and tracking are often key to measuring productivity across multiple levels, including individual staff, clients, tasking and the firm as a whole. Time entry can be performed in multiple ways in ProSystem *fx* Practice Management, with spreadsheet views providing selection lists for clients, tasks, calendars and other data entry.

The optional CCH Coolbar also gives integration with Microsoft Office products (including Outlook), providing a tool that appears within those programs, for accessing real-time views of client information pulled from ProSystem *fx* Practice Management. Tasks from the Outlook Calendar can also be easily turned into timesheets, streamlining entry and client contact management and helping to ensure accurate data by providing a unified work environment. The system's workflow includes multi-tier time and expense sign-offs, including e-mail based routing of approvals.

Project management tools include due date management, project budgeting, budget-to-actual comparisons, and the ability to assign staff to projects. Client contact management features offer utilities for tracking multiple contacts at clients, business affiliates, prospects and leads, including functions for marketing and analyzing new client wins. ProSystem *fx* Practice Management includes payroll setup functions to provide an export of staff payroll hours and offers tracking of paid time off and other benefits, along with the ability to track CPE credits. 4.75

Invoicing Functions

Invoicing functions are among the core management functions of ProSystem *fx* Practice Management, with simplified processes for performing client billing, along with options for assigning billing statuses on a per-client basis, project-based billing, WIPs, budget-based billing, and access to historical transactions. Flat-fee recurring invoices, such as monthly service fees, can be generated on a batch basis.

The program includes an AR module for managing client balances, with alerts that

and other in-house training activities. Managerial reporting options include 70 standard options that can be customized with the built-in report writer or output into Excel format for further customization. Reports can also be saved to PDF. The program includes extensive security features, including access rights and the ability to copy user permissions for departments or account teams. 4.75

Integration & Data Management

ProSystem *fx* Practice Management can generate reports and client deliverables such as invoices and collection letters into multiple formats, including PDF, Word, Excel and text. The system integrates thoroughly with other programs in the ProSystem *fx* Suite, including Tax and Write-Up. Integration is also available with Outlook for contact management and time entry functions, as well as with Sage's Abra for payroll, and MAS 90, MAS 200 and MAS 500 for GL purposes. The system offers direct emailing of client billing, but does not offer a built-in electronic payment utility. A web-based utility is also available for entering time and expense data. 4.75

Help/Support

ProSystem *fx* Practice Management has traditional Help functions along with additional assistive features such as right-click menus and context-specific guidance. CCH's support website includes knowledgebase articles, program updates and forms, along with access to the firm's CCH account, but would be better rounded out with the addition of tutorial videos and an online user community. Program updates, which must be maintained by the firm, and live technical support are included in pricing. 4.5

Summary & Pricing

Built on .NET, ProSystem *fx* Practice Management uses the most modern technologies, which enables it to provide an intuitive work environment with extensive personalization capabilities and strong integration with other programs in

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