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PracticePro 365

<https://practicepro365.com>

[From the 2020 reviews of practice management systems.](#)

PracticePro 365 is built off of Microsoft Dynamics and is accessible via any Internet browser. You can access PracticePro 35 using any device including a tablet or smart phone, with an option to use a browser or download the dedicated mobile app.

PracticePro 365 is loaded with features including real-time dashboards, planning and forecasting capability, time and expenses, billing and invoicing, workflow automation, and a complete CRM. You can set any page in the application as your home page which will appear upon login. The application lets you view all active accounts from a single screen, which indicates client type, account or client name, primary contact, and industry.

One of PracticePro 365 best features is its numerous dashboards which can be completely customized to display any desired information. Dashboards available include a variety of customer service dashboards, a marketing dashboard, a sales activity dashboard, an accounts receivable dashboard, a billings dashboard, a project management dashboard, and a business development dashboard. All dashboards are dynamic, so you can just click on a dashboard item to view additional details regarding that item. You can also create a new dashboard in PracticePro 365 if you wish.

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PracticePro 365 offers numerous ways to enter time, including timesheet entry. The timesheet has a list of tasks that you're currently working on with a time grid to the left of each task, where you can easily record your time. Comments can also be added to any time entry. You can also use the timer, which can be started and stopped when necessary. Time recorded using the timer will be automatically captured in PracticePro 365, so you don't have to add it to your timesheet. Time recorded can then be submitted to the appropriate party for approval and/or processing.

Billing and invoicing in PracticePro 365 are easy. The Quick Invoice process lets you choose the billing managers and their related engagements for easy invoicing, choosing all engagements or a select few. There is a review option available for managers as well, so all billings can be reviewed for accuracy prior to processing an invoice. A prior billing history can also be reviewed for each client if desired. You can create a progress bill for work still in progress or a final bill for work that is complete. Once an invoice is completed, it can be reviewed for accuracy, with an option to adjust payment terms and due dates if desired.

PracticePro 365 offers flexible workflow management capability, with each return prepared having its own standard workflow. Staff can easily view all assigned tasks from a single screen, and managers can easily view the entire engagement as well as each task that has been assigned, as well as current progress on each task.

All PracticePro 365 subscribers have complete access to the support portal and other self-help tools, along with access to PracticePro University. In addition, there are three tiers of support offered, with additional support services offered as well.

PracticePro 365 starts at \$75-\$100 per user, with implementation assistance provided

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