



Tax & Accounting

CCH[®] ProSystem fx[®] Practice Management — Basic Edition

Workflow

CCH ProSystem fx Practice Management — Basic Edition is an easy-to-use tool for managing every aspect of your firm. Using the latest technology, Practice Management provides effortless time entry, efficient billing, proactive management of receivables, organized contact management and powerful reporting capability.

Powerful Practice Management Functionality
Time and Expense Entry — An intuitive time-entry screen encourages daily use by employees. Unlimited timers help employees increase their billable time by capturing actual time spent on projects. Summary views with drill-down capability simplify timesheet analysis — including sick, vacation, billable and non-billable time.

Contact Management — Access client information using a simple Windows[®] Explorer[®]-style search. Improve client service with features that provide instant views into client WIP, accounts receivable, invoices and more.

Billing and Invoicing — There's no need for a third-party word processing program to get your bills out. Flat-fee billing in a quick, batch format can speed the billing process for your monthly clients. Additionally, many users are finding on-screen review much more effective than using printed reports. On-screen review provides options to review historical transactions prior to generating the bill, generate invoices on-screen prior to printing or emailing, and assign a status to indicate that invoices are ready for printing.

Dashboard Key Indicators — Utilizing our user-configurable dashboards, you can easily identify and assess critical client and

staff information without running reports. Dashboard functionality includes:

- Summarization of key data, presented both numerically and in graphical form.
- Dynamic access to current year, prior year, period-to-date and year-to-date information.
- Analysis of critical client data including time, expenses, invoicing, write-ups, write-downs and collections.

Accounts Receivable — Easily manage receivables with simple tools for everything from entering payments and adjustments to assessing finance charges. Increase your bottom line by emailing statements and take advantage of customizable dunning letters that help collect delinquent accounts.

Reporting — Powerful views and extensive sorting and filtering options are available for more than 70 standard reports. Our easy-to-use Report Writer even allows you to customize reports. Not interested in a printed format? Reports can be emailed, saved as PDFs, and exported to a variety of other formats, including Microsoft® Excel®.

Practice Management — Office Edition

For advanced project management and firm marketing features, CCH ProSystem fx Practice Management — Office Edition is the next step up for efficiency and profitability. The full version of Practice Management gives you the powerful time and billing features that are found in the Basic edition, plus:

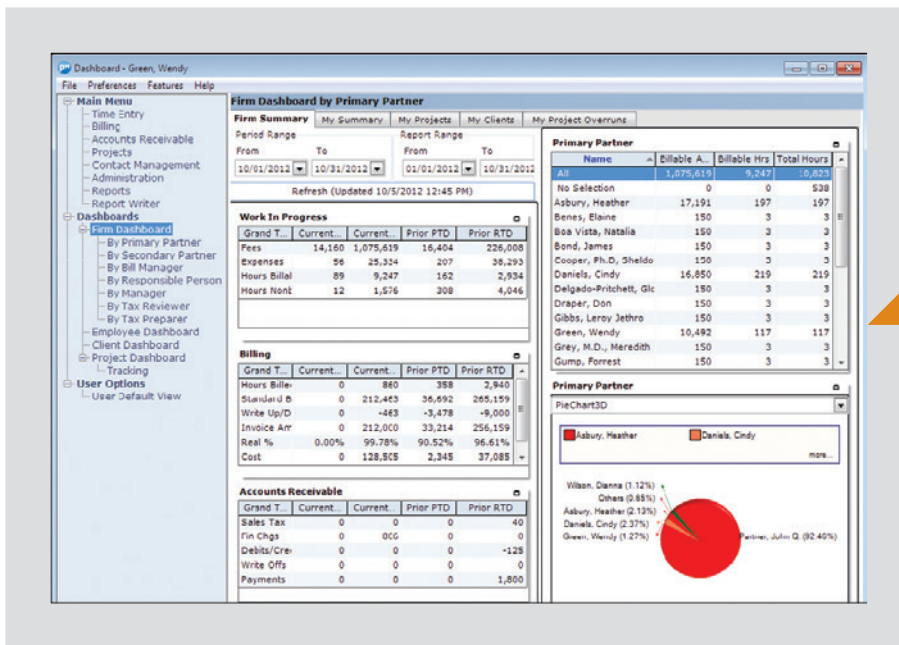
- Time entry alerts to remind staff to enter time.
- Marketing and referral information for clients, marketing reports, marketing lists, mail merge and marketing email features.
- Multi-office options.
- Extensive project management, including scheduling reports and the ability to bill by project.

CCH® ProSystem fx® Professional Services Expand Your Team

Wolters Kluwer has a team of professionals who specialize in data conversion techniques; stand-alone utility design and development; data reassignment methods, and reporting techniques. When customization is needed, invest your time and money wisely and let Wolters Kluwer experts do the work for you!

Professional Services can provide you with services such as:

- **Database Clean-Up, Including Code Restructuring** — A clean database can speed up all of your processes — from client and service code lookups to running reports — and CCH ProSystem fx Professional Services can help clean up your Practice Management database for an immediate increase in efficiency.
- **Data Conversions from Third Party Vendors** — With 30+ years of experience converting data from programs such as Unilink, CSI and Timeslips, our Professional Services team can convert just about any third party software to CCH ProSystem fx Practice Management, saving you the countless hours of lost productivity and revenue that are typical of manual data conversions. Our standard conversion includes client information, open WIP and A/R detail. Additional conversion offerings include due dates, billed WIP history (including invoice history), A/R collection history, client contact mailer information and custom fields. Every conversion is customized to meet your firm's specific needs.



The Firm, Employee, Project and Client Dashboards give partners, managers and staff the critical information they need to make informed decisions about managing workflow and projects.

CCH ProSystem fx Practice Management Training and Consulting

Maximize the value of CCH ProSystem fx Practice Management with training and consulting sessions conducted by experienced Wolters Kluwer consultants.

The training and consulting sessions for Practice Management are designed to help your firm obtain the greatest possible return on investment. An experienced Practice Management consultant can provide guidance on configuration options, recommend processes and suggest an overall implementation plan that will help your firm accomplish short- and long-term Practice Management goals. Each Practice Management training and consulting session is conveniently available in a web-based or on-site format.

Effective Rollout

Develop a comprehensive implementation plan with your Practice Management consultant for a successful rollout from day one. Consider the following questions: Will everyone begin using Practice Management at once, or in phases? Are you implementing all areas of Practice Management from the start, or are you implementing certain features at a later time? What are effective policies for firms of a comparable size as yours?

Customized Setup to Meet Your Needs

- Make decisions on basic setup items, such as timer functions, A/R payment entry method, labels for client Staff positions and Project Status Dates.
- Create lists used in the program.
- Set up employees within the program.
- Set default security settings for individual employees.
- Evaluate and set up your service codes (work code) structure that includes Categories, Subcategories and Service Codes.
- Set up your default invoice format.
- Make decisions about how to enter contacts, including new and existing Clients and Prospects.
- Prepare for an electronic data conversion, if applicable.

Go Beyond Time and Billing

Learn how you can take advantage of time-saving possibilities offered by Practice Management:

- Firm, Employee, Client and Project Dashboards that give staff real-time data to assist with making better firm management decisions.
- A full Accounts Receivable module that allows you to manage payments and adjustments, calculate finance charges and generate A/R statements and dunning letters.
- Produce pre-formatted standard reports, create report Queues to process reports in a batch and utilize the Report Writer to build custom reports.
- CPE tracking system for staff.

Drive Efficiencies

Your Wolters Kluwer consultant can show you how Practice Management can enhance your firm's workflow by using features designed to increase firm efficiency.

- On-screen features that eliminate the need to print to paper — assisting in paperless efforts.
- Ease of access to prior year statistics when analyzing employee and client data.
- Use of Report Monitor to set a scheduled date and time for report Queues.

ProSystem fx® Practice Management Training and Consulting Services

Course Name	Description	Who Should Attend
Best Practices Consulting One day — 8 hours, or two days — 16 hours*	A consultant will guide your firm's implementation leaders through important decisions within the program. The content includes how to prepare a new customer for an upcoming electronic data conversion. New customers will gain a head start on using the program to its fullest potential, while existing customers benefit from a detailed review of their current practices.	The Practice Management Champions Team (PMCT). The PMCT is established prior to the Best Practices session and could include 3–10 power users in the firm to champion the Practice Management processes.
Setup Training 4 hours*	The course focuses on a group of important options and features you must set up for the program to function properly. This course focuses on some of the most basic functions you must set up when implementing the program manually or when having an electronic data conversion.	Staff involved in determining your firm's best practices and program setup. While this course does not expressly cover best practices, it is important to involve decision-makers.

Course Name	Description	Who Should Attend
<p>Administrator Training</p> <p>4 hours*</p>	<p>The course focuses on the key features in the Administration and Accounts Receivable modules including creating new clients and prospects, administrative activities and utilities, entering and posting A/R transactions and processing A/R statements. By learning how to work properly within these modules, you can better manage the program on a day-to-day basis.</p>	<p>Staff responsible for managing day-to-day operations in the program, including managing clients, contacts, security, time and A/R.</p>
<p>Biller Training</p> <p>4 hours*</p>	<p>The course focuses on features that help to ensure timely, profitable billing. Having WIP, prior invoice and A/R information at your fingertips saves time and money. Keeping management up-to-date on the status and progress of client accounts is the fundamental philosophy that drives the course.</p>	<p>All staff who select clients to bill, make billing decisions, correct or transfer WIP, generate, format or process invoices and review and approve bills.</p>
<p>End User Training</p> <p>2 hours*</p>	<p>The course focuses on the key features that all employees use when entering time and expense transactions and finding client contact information. The session also includes a thorough overview of the Practice Management Dashboard.</p>	<p>All staff entering time and expenses, looking up contact information and using the Dashboard.</p>
<p>Reports Training</p> <p>2 hours</p>	<p>The course focuses on using various reporting options to better analyze data stored in Practice Management. The content addresses the need for up-to-date information concerning WIP, Billing and A/R using Dashboards and customized on-screen lists. This course also covers standard, preinstalled reports and use of the embedded Report Writer to create custom reports.</p>	<p>Staff processing or creating reports in Practice Management.</p>

Course Name	Description	Who Should Attend
<p>Custom Consulting</p> <p>1-hour, 2-hour, 4-hour or 8-hour increments</p>	<p>Create your own agenda and benefit from the opportunity to have a qualified consultant answer your firm's specific questions.</p>	<p>Determined by the firm's agenda.</p>

* Mandatory training for new customers includes Best Practices (one day) or Setup training (both are not necessary), Administrator training, Biller training and End User training (web-based format or on-site format).

