Wolters Kluwer

When you have to be right

Tax & Accounting

CCH® ProSystem fx® Practice Management

Workflow

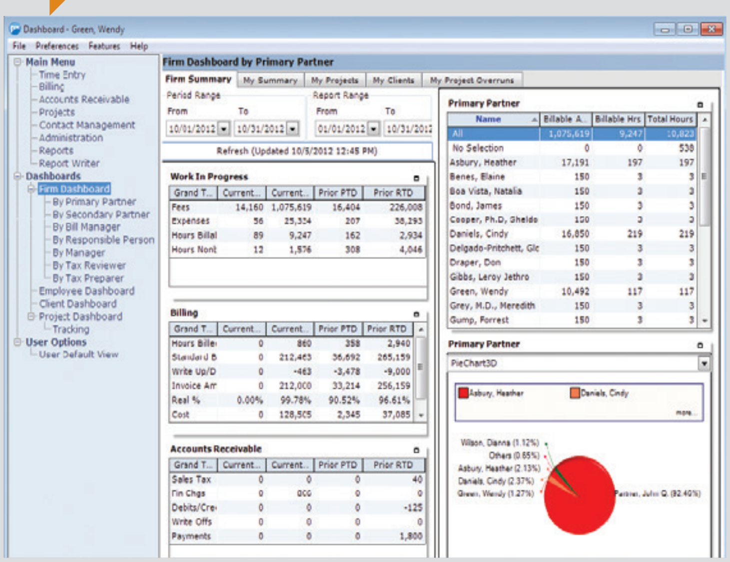
Powerful, Award-Winning Software
Effectively manage your firm's workflow with a full-featured software program that includes:

- Firm, Employee, Project and Client Dashboards that give partners, managers and staff the critical information they need to make better firm management decisions.
- .NET technology in combination with Microsoft® SQL databases.
- Time and billing designed for employee self-management.
- Contact Management, a tool that puts client contact information at your fingertips.
- The ability to track due dates, budgets, key milestones and more.
- Accounts Receivable, a tool that easily manages a full client ledger system.
- Standard reports and report writer capabilities that provide robust management insight.
- Referral and prospect tracking that increases firm growth capabilities.
- CPE tracking that saves time for employees.
- The ability to generate mass emails, labels and letters that empower firm marketing and generate new business.

Time-Saving Integration

CCH ProSystem *fx* Practice Management is integrated with General Ledger and offers a synchronization with Microsoft® Outlook®. Its flexibility and customization capabilities make it an excellent choice for any size accounting firm.

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.



Increase Your Productivity

CCH ProSystem *fx* Practice Management provides all the modules you need for effective firm management:

- **Project Management and Tracking**
  - **Monitor client project due dates including alerts** to ensure timely service and delivery to clients.
  - **Report on budget to actual hours and dollars** to maintain a close watch on operational efficiencies and capture every billable minute so time is never unaccounted for.
- **Billing and Invoicing**
  - **Generate and edit invoices at a glance**, track their status and email your invoices to your client when complete — or send paper invoices if you choose.
  - **Generate billing worksheets** or go directly into the software to select your Work in Progress for billing. The billing module contains many views of historic billing including productivity, former billing and payment history.
- **Accounts Receivable**
  - **Easily manage the entry of payments and adjustments** whether by one person or many.
  - **Assess finance charges** quickly and easily.
  - **Statements** ensure a way to keep balances in front of your clients and can be emailed or sent in paper format.
  - **Dunning Letters** provide another powerful tool to manage cash flow.
- **Reporting**
  - **More than 80 standard reports** organized in folders. Reports can be exported to Microsoft® Excel® and saved as PDFs for quick emailing.
  - **Easy to use report writer** provides 50 templates to help you create customized reports for your firm.
  - **Open architecture** ensures a more robust path for IT experts who would like to link a database to the host MS® SQL database.

- **Time and Expense Entry**
  - **Intuitive time entry** screen encourages daily use by employees.
  - **Unlimited timers** provide alternative tools for employees to increase their billable time.
  - **Additional tools** empower employees to stay self-managed with views of historic time, project assignments, unreleased time, employee budgets, employee productivity ratios and more.
  - **Remote options** include the use of the Internet to connect to the host as well as an off-line method to save time entry transactions to a file for later accessibility.

- **Forecasting**
  - Anticipate staffing needs and spot bottlenecks before they occur.
  - Provide better client service by ensuring workload is evenly balanced among staff.
  - Encourage employee self-management by allowing staff to schedule their own time and view weekly forecasts.

Gain a Competitive Edge with Add-On Productivity Tools

Invest in CCH ProSystem *fx* Practice Management's add-on tools to make your firm even more productive and efficient.

Professional and Client Services

Our team of professionals specializes in data conversion techniques, stand-alone utility design and development, data reassignment methods and reporting techniques. When customization is what you need, invest your time and money wisely and let these experts do the work for you:

- Database clean up, including code restructuring.
- Data conversions from third party vendors.
- Automation of routine administrative tasks.
- Creation of customized reports.

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 CCH ProSystem *fx* Practice Management are designed to help your firm obtain the greatest possible return on investment. An experienced CCH ProSystem *fx* 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 CCH ProSystem *fx* Practice Management goals. Each CCH ProSystem *fx* 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 CCH ProSystem *fx* Practice Management consultant for a successful rollout from day one. Consider the following questions: Will everyone begin using CCH ProSystem *fx* Practice Management at once, or in phases? Are you implementing all areas of CCH ProSystem *fx* Practice Management from the start, or are you implementing certain features — such as marketing and project management — at a later time? What are effective policies for firms of a comparable size as yours?

Go Beyond Time and Billing

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

- Firm, Employee, Client and Project Dashboards that give staff real-time data to assist with making better firm management decisions.

- The ability to track project due dates, project status, milestone dates and budget-to-actual information.

- 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.

- Contact management that goes beyond client contact information to include contacts such as Business Affiliates, Referrals, Prospects and Leads.

- Marketing features that include mailer lists for letters and labels and the ability to track marketing efforts.

Drive Efficiencies

Your Wolters Kluwer consultant can show you how CCH ProSystem *fx* 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.

- Remote options that allow staff to enter time and expenses in an off-line environment.

- Ease of access to prior year statistics when analyzing employee and client data.

- An alert system to inform staff of upcoming due dates, budget milestones, WIP and A/R limits and old A/R balances alerts.

- Use of Report Monitor to set a scheduled date and time for Report Queues.

CCH ProSystem *fx* Practice Management Training & Consulting

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 CCH ProSystem *fx* 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 CCH ProSystem *fx* 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.
Administrator Training 4 hours*	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.	Staff responsible for managing day-to-day operations in the program, including managing clients, contacts, security, time and A/R.
Biller Training 4 hours*	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.	All staff who select clients to bill, make billing decisions, correct or transfer WIP, generate, format or process invoices and review and approve bills.

Course Name	Description	Who Should Attend?
End User Training 2 hours*	The course focuses on the key features that all employees use when entering time and expense transactions, finding client information and working with their assigned clients or projects. This session includes a thorough overview of the CCH ProSystem *fx* Practice Management Dashboard.	All staff entering time and expenses, looking up contact information and using the Dashboard.
Projects Administrator Training 2 hours	The course focuses on creating and managing projects. Project Management list setup and project creation are integral parts of this course, but the content includes additional setup and management features, such as assigning employees to projects, establishing budget information and scheduling employees.	Staff who create projects, set time budgets for projects, assign staff to jobs and schedule project workload.
Reports Training 2 hours	The course focuses on using various reporting options to better analyze data stored in CCH ProSystem *fx* 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.	Staff processing or creating reports in CCH ProSystem *fx* Practice Management.
Custom Consulting 1-hour, 2-hour, 4-hour or 8-hour increments	Create your own agenda and benefit from the opportunity to have a qualified consultant answer your firm's specific questions.	Determined by the firm's agenda.

*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).

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For More Information
CCHGroup.com/PracticeManagement in Canada 800-268-4522

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