



# ProSystem fx<sup>®</sup> Practice Management

More Than Just a Time and Billing System

CCH is Advancing Business with Best in Process™ Solutions, Delivering Faster Answers and Better Results.

## Powerful, Award-Winning Software

Effectively manage your firm's workflow with a full-featured software program that includes:

- Firm, Employee 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.

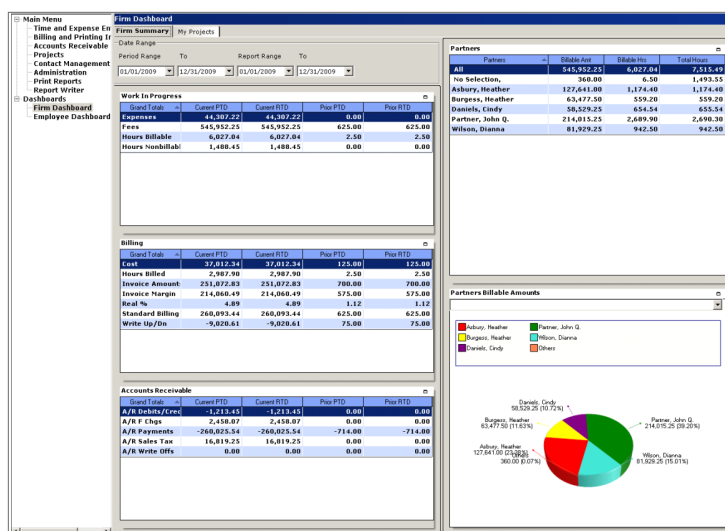
## Time-Saving Integration

ProSystem fx<sup>®</sup> Practice Management is integrated with ProSystem fx<sup>®</sup> Tax as well as General Ledger and offers a synchronization with Microsoft® Outlook®. Its flexibility and customization capabilities make it an excellent choice for any size accounting firm. Simply select the edition that best fits the needs of your practice:

**Enterprise Edition** — The optimal Microsoft® SQL.

**Office Edition** — The Microsoft® SQL Express solution.

**Basic Edition** — Includes more features than any comparable time and billing package available on the market.



The Firm, Employee, 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

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.

## ■ Contact Management and Marketing

- **Quick client information at a glance** ensures better conversations with a client phone call.
- **Recording client business affiliates, prospects and leads** provide powerful relationship information to gain new clients.

## ■ 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 70 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 templates to usability.
- **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 including Remote Options

- **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.

## Gain a Competitive Edge with Add-On Productivity Tools

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

- **Internet Time Entry** — Enables employees to enter their time and expenses from any location with an Internet connection.
- **ProSystem fx® Practice Intelligence** — Places powerful key indicators at your fingertips and allows you to benefit from these powerful, real-time decision-making features:
  - View firm summaries with drill down capabilities on the fly.
  - Comparisons of year-over-year statistics for clients, services and management.
  - Analyze client data, including time and expense, invoicing, write-ups and write-downs, payment collections and employee data.

## Benefit from ProSystem fx Professional 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.

## Training and Consulting Options to Fit Your Needs

CCH also offers valuable training, consulting and CPE to keep you ahead of the curve. From live training and consulting, to on-demand online learning, CCH provides the tools that everyone, from new hires to seasoned pros, needs to strengthen their abilities. Visit [CCHGroup.com/Learning](http://CCHGroup.com/Learning) to learn more.

For more information on  
ProSystem fx® Practice Management  
call 800-PFX-9998 (800-739-9998) or visit  
[CCHGroup.com/ProSystemPracticeManagement](http://CCHGroup.com/ProSystemPracticeManagement)

*The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at [CCHGroup.com/ProSystemPracticeManagement](http://CCHGroup.com/ProSystemPracticeManagement). If you plan to use multiple ProSystem fx Suite products within the same system, call 800-PFX-9998 (800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.*

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