



# ProSystem fx® Practice Management – Basic Edition

Simplify your critical time and billing tasks.

ProSystem fx Practice Management is an easy-to-use software program that was designed to manage every aspect of your business, including effortless time entry and billing. Using the latest .Net technology, the program includes other modules such as contact management, receivables, reports, and report writer.

Increase your productivity and efficiency while maintaining your focus on client tasks, using:

- Integration with ProSystem fx Tax and ProSystem fx Write-Up.
- Reports designed for accounting professionals.
- Strategic decision support tools.
- Intuitive time and billing solutions.

Practice Management's flexibility and intuitive design make the program an excellent choice for small accounting firms – with plenty of room for expansion. Increase your productivity today!

## POWERFUL PRACTICE MANAGEMENT MODULES

ProSystem fx Practice Management has all the modules you need for effective firm management.

**Time and Expense Entry** – An intuitive time-entry screen to encourage on-screen, daily use by employees. Unlimited timers help employees increase their billable time by effortlessly capturing actual time spent on projects. Employees easily analyze timesheet entries – including sick, vacation, billable, and non-billable – in summary view and with drill-down capability. Convenient alerts even help employees remember to submit their time!

**Contact Management** – Lets you find your client information using a simple Windows® Explorer-style search. Support your client service with features that provide instant views into client WIP, AR, invoices and more.

**Billing and Invoicing** – Includes user-friendly screens for quick learning and powerful invoicing. There's no need for a third-party word processing program to get your bills out. You can use a monthly, flat-fee billing in a quick, batch format. And, on-screen review is even more effective than printed reports, with options to review historical transactions for informed billing decisions, generate invoices on-screen, and assign a status to indicate that invoices are ready for printing.



Help employees manage their own time with this easy-to-use time entry screen.

**Key Indicators** – Powerful business intelligence at your fingertips. With ProSystem fx Practice Management, you can easily identify and assess critical client and staff information without running reports. At no additional cost, you'll benefit from powerful, real-time decision making features that are secure, easy-to-use and require no data import, including:

- Firm summaries that are available from the menu bar and display from your Time Entry window, for staff with security rights.
- Dynamic access to four dimensions of your firm, including current year, prior year, PTD, and YTD key figures.
- Analysis of both client and employee data, including time and expenses, invoicing, write-ups and write-downs, and payment collections.

**Accounts Receivable** – Easily manage your client balances with simple tools for everything from entering payments and adjustments to assessing finance charges. Help increase your bottom line by emailing statements, and take advantage of customizable dunning letters that help you manage delinquent accounts.

**Reporting** – Offers many powerful views and extensive sorting and filtering options, with more than 70 standard reports on clients, employees, service codes, and due dates. With an easy-to-use Report Writer you can even customize your own 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.



## PROSYSTEM fx PROFESSIONAL SERVICES EXPAND YOUR TEAM

CCH 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 what you need, invest your time and money wisely and let CCH experts do the work for you!

Professional Services can provide you with services such as:

- **Database Clean-Up, Including Code Restructuring** – The last thing you need to worry about during the day is a sluggish database preventing you from achieving peak efficiency. A clean database can speed up all of your processes – from client and service code lookups to running reports – and ProSystem fx Professional Services can help clean up your Practice Management database for an immediate increase in efficiency. Need a change to your service codes? Want to delete those old clients? Increase your productivity and gain an uncluttered database with our Professional Services.
- **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 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.

For more information on ProSystem fx®  
Practice Management – Basic Edition  
call 1-800-PFX-9998 (1-800-739-9998)  
or visit [CCHGroup.com](http://CCHGroup.com)

*The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at [CCHGroup.com/PracticeManagement](http://CCHGroup.com/PracticeManagement). If you plan to use multiple ProSystem fx Suite products within the same system, call 1-800-PFX-9998 (1-800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.*

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