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Users can manage the timer function directly from the user dashboard, or ...

Mary Girsch-Bock • Apr. 23, 2016



From the **2016 Reviews of Practice Management Systems**.

**Best Fit:** With one-screen time entry capability, CCH Axcess Practice is an excellent fit for mid-sized to larger firms that currently use other products in the CCH Axcess Suite. Strengths:

- CCH Axcess Practice offers cloud technology and mobile apps for easy remote system access
- User interface is intuitive
- Offers multiple timers which can be used simultaneously
- Integrates seamlessly with other CCH Axcess products

**Potential Limitations:**

- The product performs best if used with other CCH Axcess modules
- Those migrating from other CCH products may face a steeper learning curve

**Basic System Functions: 5 Stars**

Moving to HTML 5 has allowed CCH Axcess to create a much more flexible, simplified user interface. Boasting cloud technology, users can access CCH Axcess Practice from

anywhere with an Internet location. The main screen of the product offers easy

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locate a client. Time can be assigned to a project, and even a workstep can be defined when using the timer.

Users can also enter time using the time entry screen, with users able to track banked hours and CPE as well as manage flexible billing rates depending on the job and the client. A handy reminder to log hours is provided to users when the system is shutting down. Users can set alerts and notifications in the system that will display an alert when a pre-set WIP limit has been exceeded, when clients have been billed or made a payment, when project hours have exceeded a pre-set limit, and when pre-set AR limits have been exceeded.

Client balances, payments, and invoices can be easily accessed and edited directly from the client dashboard as needed. A simplified billing process allows users to easily handle flexible billing workflows, as well as automatic billing and progress billing. Data entry screens throughout Axxess Practice are easily navigated, with excellent look up and search capability, as well as the availability of tabs that make system navigation simple.

Though users can opt to use CCH Axxess Practice as a stand-alone product, coupling it with other Axxess products such as Workstream can enhance system functionality greatly, with users able to compare budgeted time against actuals, organize and bill WIP by project, automatically populate invoices with project details, and ultimately determine which projects are profitable.

### **Time Management Capabilities: 4.5 Stars**

Users can access the timer functionality through either the dashboard or the Workstream module. Cloud technology and the availability of a mobile app make it easy to manage time entry from any location. The time entry screen will remember previous entries and will automatically populate fields as needed. The easily

navigated timer entry interface allows users to quickly start and utilize multiple

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Along with tracking employee time, the product can also track employee data such as vacation and sick time, CPE, and comp time. The availability of the client dashboard offers users an easy way to access vital client data from anywhere at any time, including client balances, payments received, and invoice totals. Managers can choose to have employee time reviewed and approved prior to processing, for better quality control.

### **Invoicing Functions: 4.5 Stars**

An enhanced interface makes it even easier to navigate through the various billing options, with users able to preview bills on screen, or edit billing data as needed. AAccess Practice offers users a variety of billing options, including progress billing, batch billing, and the ability to process multiple invoices for a single client. Users can set up automatic billing for recurring billings, and even create multiple billing fee agreements based on either standard firm rates or custom rates.

The progress billing option provides a lot of flexibility to a firm, with the ability to send WIP invoices to clients for more complex projects. Client payments can also be distributed on user-defined criteria, or simply tracked as they are received. Users can opt to bill clients one-on-one or bill groups of clients simultaneously. Bills can be emailed to clients as a PDF, printed for mailing, or sent to an integrated document management system.

The Clock Took provides accounting firms and their employees with the option to use multiple system timers simultaneously.

### **Management Features: 4.5 Stars**

The availability of both client and user dashboards provides product users with an easy way to navigate the system, enter required data, and access vital client data. The

dashboards also provide managers with data such as staff productivity, firm growth,

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WIP Detail Ledger, Staff Time Analysis and a host of others. Reports can be previewed on screen printed or exported to third party applications.

### **Integration/Import/Export: 4.75 Stars**

CCH Axcess Practice works best when coupled with other Axcess modules such as Workstream, Portal, Tax, and Document. All Axcess modules integrate, eliminating the need for duplicate data entry. Cloud-based technology provides users with the flexibility to access the product anywhere, anytime, and the addition of a mobile app that works with both iOS and Android devices enhances that flexibility tremendously.

### **Help/Support: 5 Stars**

CCH Axcess Practice offers users excellent help functionality, along with easy access to an online knowledgebase. Technical support is included in the cost of the product and is available during regular business hours, with support hours extended during peak season. Users also have access to self-study courses and webinars, and there are a variety of training courses available as well.

### **Summary & Pricing**

An excellent solution for firms that desire anytime system access and solid remote system access capability, CCH Axcess Practice truly shines when used as part of the suite of products offered in the Axcess line, though the product can be used as a stand-alone practice management tool as well. Axcess Practice starts at \$255.00 per user per year, and firms with multiple users are eligible for product discounts.

## **2016 Overall Rating: 4.75 Stars**

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