# Practice Management

CCH Axcess Practice Management and ProSystem fx Suite's Practice Management both from CCH Group are best suited for mid-sized or larger accounting firms that use other CCH applications.

**Mary Girsch-Bock** • May. 19, 2020



**CCH Axcess Practice Management & ProSystem *fx* Suite Practice Management**

**Wolters Kluwer**

**800-739-9998**

www.cchgroup.com

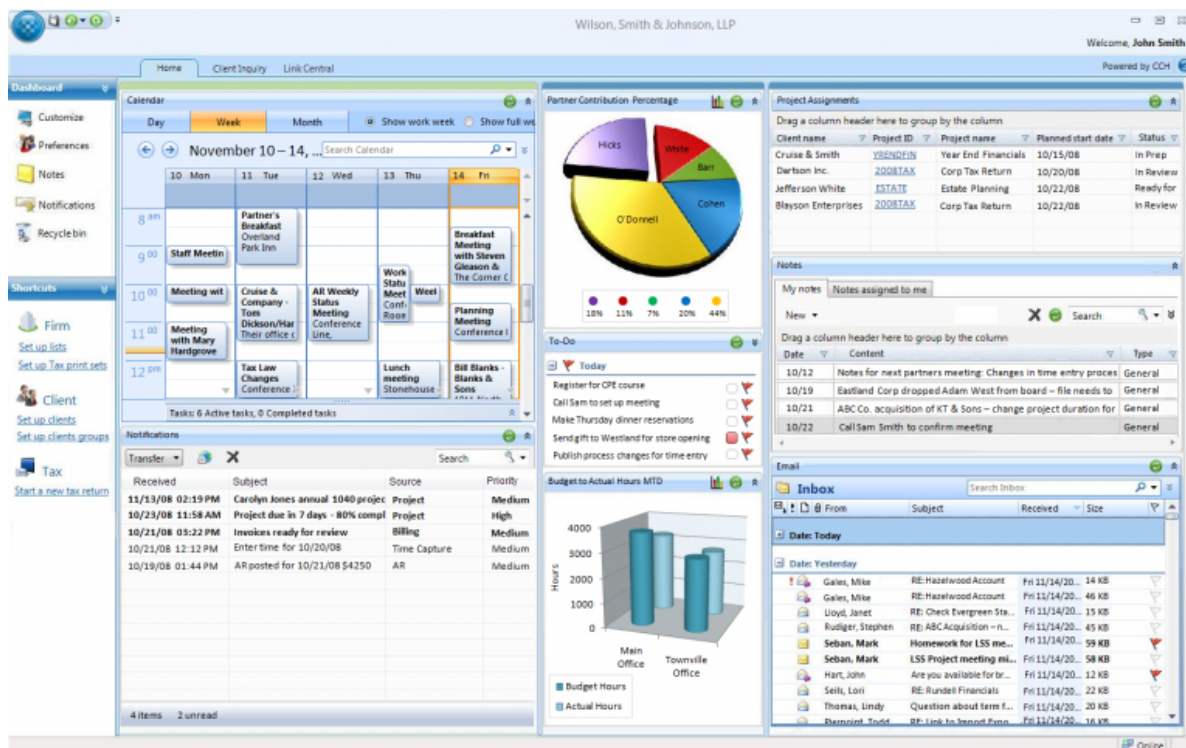**From the 2020 reviews of practice management systems.**

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use other CCH applications.

resources dashboard has recently been added, making it easier for managers to view available staff resources when assigned new projects or tasks. In addition, the resources dashboard includes forecasting capability, allowing managers to easily spot potential staffing issues and balance workload between staff appropriately.



Both applications offer intuitive navigation, with easy access to system functions including Time & Expense Entry, Billing & Printing Invoices, Accounts Receivable, Projects, Contact Management for Clients, Administration, Print Reports, as well as a built-in report writer. The Contact Management for Clients allows firms to track current clients, as well as prospects and leads.  Managers can also analyze referral and affiliate programs as needed.

ProSystem *fx* makes great use of dashboards, which provide excellent up to date information to management, and the Accounts Receivable module allows users to easily enter payments, add finance charges, make adjustments to current billings, and email statements to clients.  The product is designed to work in conjunction

with other modules found in ProSystem *fx* Suite, and offers easy integration to CCH

and billable and non-billable time. The time entry screens are intuitive with tabs at the bottom of the screen offering access to additional features such as MTD Hours, Bank Hours, Correct Date, and Timer On/Off functions. Users can also track budgeted time against actuals, and can update the status of any project while also entering time.

Both CCH Axcess and ProSystem *fx* include a variety of billing options including a quick bill option, batch billing, and progress billing. Users can also bill groups of clients together, create multiple billing fee agreements, and automatically bill clients on a fee basis. In addition, firms can easily email invoices directly to clients, or use the CCH Axcess portal to share invoices electronically.

Both applications also include complete project management capability, with the ability to monitor all project due dates, create and maintain a separate budget for each project. In addition, project leaders are notified when a project reaches a projected milestone and alerts users when budgets are close to being exceeded. The project management feature also allows users to assign projects to staff members.

There are five customizable dashboards available in CCH Axcess and ProSystem *fx*, including the Firm Dashboard, which provides an overall view of firm activity, WIP, and active client due dates. The Employee Dashboard is designed to provide staff members with an overview of billable time, current time data, and productivity levels while the Client Dashboard provides users with a good overview of all current client activity. The Project Dashboard serves as a central location for access all project related data, and the new Resources Dashboard provides management with a good view of all staff activity and available resources which is extremely helpful when assigning new projects or tasks. Both applications also include a billing review option, where users can review all billing data or access complete billing history.

CCH Axcess Practice and ProSystem *fx* Practice Management include numerous

with Microsoft Office applications; CCH Axcess offers better integration with third-party applications.

The CCH Learning Center offers access to a variety of help options including informational videos, interactive webinars, and white papers. Even better, users have access to more than 350 self-study courses that are available from the support center. Users can also access all help and support options from within CCH Axcess Practice or ProSystem *fx* Practice Management. FAQs and product guides are available from the support center, and users are able to access product updates from this location as well. Both applications offer telephone and email support options through the annual maintenance agreement.

Pricing for both applications is available upon request.

**2020 Rating: 4.75 Stars**

Strengths:

- Offers solid integration with other CCH applications

- Excellent reporting

- Intuitive data entry throughout both products


Potential Limitations:

- Limited integration with third party applications

- Both applications perform better when used with other CCH products

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