Practice Management

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Practice Management – the challenges

Increased regulation, growing client expectations and lower margins on compliance work mean that accounting businesses have to be managed more efficiently than ever before.

At the same time that revenues are being squeezed, personnel costs are rising. Staff need to be as productive as possible, but they also want to be able to work flexibly.

Practice Management – the solution

CCH Practice Management meets these challenges with a range of innovative features:

Manage workflow and resource allocation

By making it easy to match personnel to jobs, you can be sure you always have just the right number and type of staff. A wall chart style planner means that everyone in the practice can see at a glance who's doing what and where they're working.

Track jobs and manage deadlines

Because staff and managers can continually monitor their progress, it becomes much easier to manage and meet deadlines. Unexpected job overruns can be avoided and client satisfaction is improved.

Provide opportunities for flexible working

Users can access the software anytime, anywhere. With support for mobile and off-site staff and multi-office environments, both productivity and employee satisfaction are maximised.

Record time in a way that suits you

By making it as easy as possible for staff to record their time, you encourage them to keep this information accurate and up to date. Ultimately, this leads to improved billing and recovery.
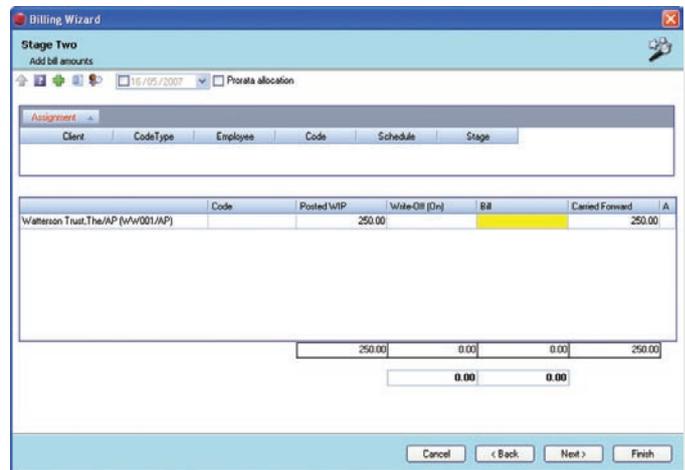
Generate bills quickly and simply

The Billing Wizard simplifies this all important task with spell checking, Microsoft Word formatting and the option of single-click billing. It's never been easier to create professional looking bills.

CCH Practice Management – key features at a glance

## Produce professional looking bills quickly and easily

- **Professional billing** – Bill templates are maintained using Microsoft Word, giving you full control over formatting and layout and making it easy to produce professional looking bills.

- **Simplified billing** – The Billing Wizard steps you through the entire process and makes sure that nothing is missed.

- **Flexible billing** – It's possible to drill right down to the task level to allocate fees and write-offs. This allows for complex billing scenarios and ensures that profitability is correctly allocated and recognised within the practice.

The Billing Wizard ensures smoother, quicker billing

- **Bill approval** – Bills awaiting approval can appear as workflow items. By simplifying the billing approval process, CCH Practice Management helps improve practice cash flow and profitability.

- **Foreign currency** – You can bill in foreign currencies and record receipts in the same or another currency, saving time on foreign currency calculations.

Make timesheet entry as simple as possible

- **Simplified entry** – Simplified data entry encourages staff to keep timesheets up to date. Accurate and up to date information means quicker billing and fewer write-offs.

- **Outlook integration** – Appointments entered in Microsoft Outlook can be turned directly into timesheet entries. The information only has to be entered once and staff can continue to use familiar, existing systems.

- **Mobile staff** – CCH Practice Management offers a range of options to capture time and expenses from mobile staff. For example, users can connect securely to the internet using a laptop fitted with a 3G card and then update information via a web browser.
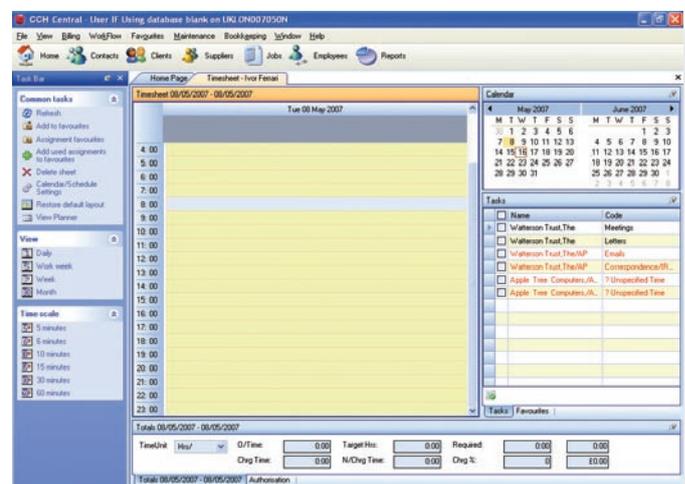

Straightforward data entry encourages staff to keep timesheets up to date

Choose a practice management system that adapts to your way of working

- **Flexibility** – Flexible time recording and reporting structures mean you can organise your practice exactly how you want.

- **Accounting links** – CCH Practice Management links to CCH Accounts Production or to a nominal ledger of your choice so you can carry on using your existing practice accounting system.

Allocate and manage resources for maximum productivity

- **Intuitive interface** – A wall chart style planner makes it easy to see where staff are working and what they're doing.

- **Reduced risk** – By enabling precise planning and forecasting, CCH Practice Management reduces the risk of overruns and the expense of overtime or underused staff resources.

- **Load balancing** – Proper planning and resource allocation eases the strain during peak periods, such as tax year ends, and allows the practice to respond to temporary resource bottlenecks caused by illness and absence.

- **Skills matching** – Staff can be allocated to client work according to the requirements of each job.

- **Budgeting** – Periodic budgets can be set for both chargeable and non-chargeable items, such as training. Staff can measure their progress against budget, encouraging responsibility and productivity.
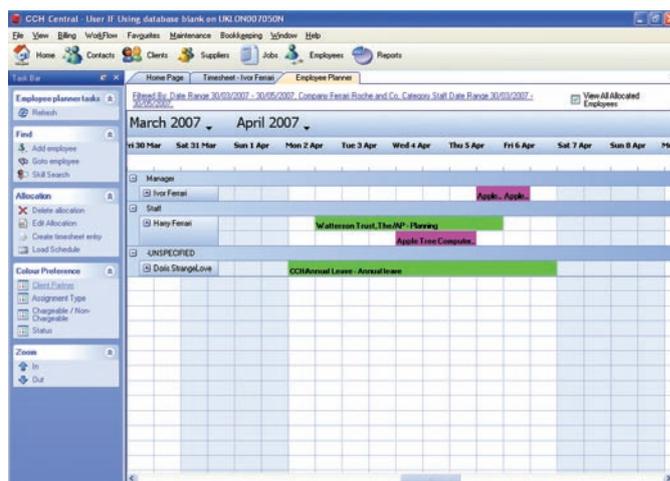

Use the wall chart style planner to spot resource conflicts and bottlenecks

Work across multiple offices and locations

- **Data synchronisation** – CCH Practice Management supports intelligent inter-office synchronisation of data.

- **Real time information** – With information replicated across all locations, decision makers always have up to date practice information.

- **Data entry** – A range of data entry options support mobile and off-site staff.

Harness client and practice information with CCH Central

- **Common environment** – CCH Central brings the CCH products together, enhancing individual applications and extending the CCH ProSystem Suite.

- **Personalised** – CCH Central allows everyone in the practice to see exactly the information they need, brought together in one place on customisable "home pages".

- **Speed and simplicity** – The browser-style environment delivers rich functionality with instant ease of use. Drill down to the detail with a single mouse click.

- **Reporting** – Cross-product reporting brings client and practice information to life, opening up new markets and opportunities.

- **Save time** – Spend less time maintaining client information with a single point of entry for data.
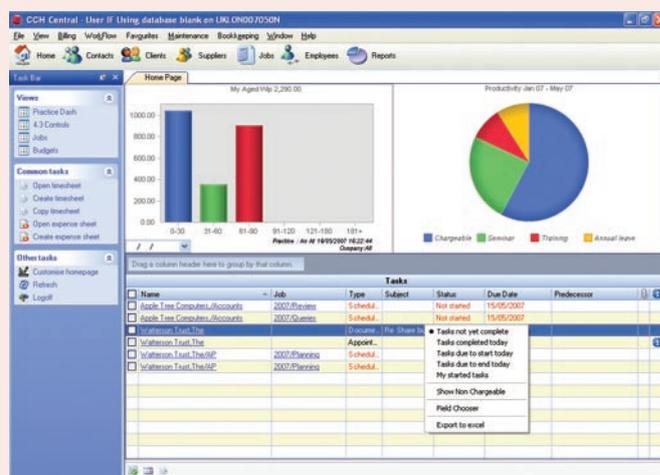
Build a home page in CCH Central to bring together all the information you need in one place

Putting integrated data to work

CCH Central integrates applications in the CCH ProSystem Suite to create something that's much more than the sum of its parts.

Its intuitive interface makes it easy for everyone – even occasional users – to use. A single point of entry means less time setting up and maintaining client data, and fewer errors.

Personalised "home pages" collect data from across the Suite and bring the information together on a single screen. You and your staff get the complete client picture all the time, without having to swap between individual programs.
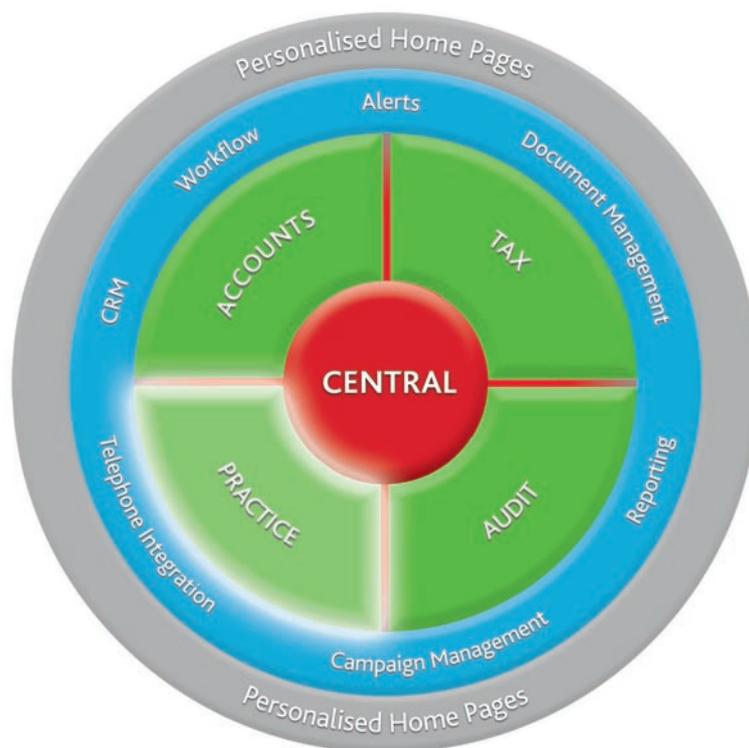
Not only is data shared across the Suite, but so are core functions, such as workflow, reporting and alerts.

Cross-application reporting

Even non-technical users can construct comprehensive reports using information drawn from multiple CCH applications, simply by dragging and dropping fields. Cross-application reporting unlocks the information you already hold within the practice.

Monitor key information

Late payers or impending deadlines – whatever you need to monitor, the software can keep an eye on it so you don't have to. Alerts can be sent by email to any number of individuals within, or outside, the practice.

Make your marketing count

Any significant piece of information about your clients or prospects – including relationships between them – can be captured, used for your marketing campaigns and reported on.

About CCH

CCH enjoys a unique position within the tax and accounting communities, having provided them with first class business solutions for more than 100 years. In April 2008 Wolters Kluwer established CCH in Ireland by acquiring MYOB Ireland. CCH now services more than 3,000 professional firms of all sizes across Ireland and the UK, from sole practitioners to to most of the top 100 accounting practices.

A wide variety of products and services are available – from software, professional development programmes and fee protection services to training and consultancy, reference books, CDs and online information.

Whether you're looking to build client relationships, improve your firm's profitability, develop new revenue streams or reinvigorate your business processes, CCH have solutions that can help.

The CCH ProSystem Suite

Central
The core products within the CCH ProSystem Suite work within CCH Central.

CCH Central provides a single point of entry for data, and enables cross-product reporting and data mining. Personalised home pages allow individuals to bring together all the information they need on a single screen.

Practice Management
CCH Practice Management helps partners and practice managers organise staff resources and maximise chargeable time. The software supports multiple offices and remote data entry and enquiry for staff working offsite.

Document Management
CCH Document Management stores and manages the full range of documents used by an accounting practice, giving 24/7 remote access to client files. Sophisticated search options and integration with Microsoft Outlook make it easy to find and use any item of client correspondence.

Audit Automation
CCH Audit Automation automates the process of conducting an audit, minimising risk, enforcing standards and reducing costs. Paperless working allows tasks to be divided easily between staff.

Tax
Through market-leading tax applications, CCH provides an integrated solution to tax administration and planning for individuals and companies, together with a company secretarial function.

- CCH Personal Tax IE
- CCH Corporation Tax IE

Accounts Production
CCH Accounts Production turns raw accounting data into finished statutory accounts quickly and cost effectively. Regularly updated accounts formats are available for a wide range of entities, including sole traders, partnerships and limited companies.

Want to know more?

For more information about CCH Practice Management or any of the other CCH products and services:

- Call us on 01 460 4718
- Send an email to info@wolterskluwer.ie
- Visit www.ie.cch.com