

Does managing your practice ever feel like this?

It doesn't have to any longer - CCH iFirm Practice Manager offers a single integrated, mobile, cloud software solution! It's guaranteed to save staff costs, create happier clients through better service delivery and improve your firm efficiency and profitability. You'll instantly relate to and like Practice Manager because it was designed and developed by an accounting firm just like yours.



EIGHT compelling benefits of Practice Manager:

- CRM Contact Database** - All contact information in one central place. Always up to date and even accessible on your smartphone.
- Job, workflow and resource driven solution** - Accounting firms are unique with their job types and recurring work required at different times during the year. Efficiency comes from matching jobs to staff resources and creating target or filing dates that meet client expectations. Practice Manager does this perfectly.
- Real time capacity planning** - Given all recurring jobs are entered along with staff resources and their available time, you'll now know with real clarity when you are over or under resourced.
- Agreed fees and flexible invoicing** - Practice Manager was designed for all invoicing methods. Know the write-up/write-off and the average hourly rate for the job.
- Flexible and insightful reporting** - Practice Manager comes with ALL the reports you need to manage your firm.
- Automation, transparency, accountability** - Practice Manager was designed to highlight 'what's going wrong' with a customisable dashboard to drive efficiency and profitability. Your team will love it!
- Multiple Entities** - One database, but invoice and create receivables ledgers for your different billing entities.
- Timesheets** - Integrated timesheets are designed to be easy to complete as you work during the day. Enter them on your tablet if you're away from the office.

1. CRM Contact Database

Practice Manager's CRM Contact Database provides you with a central searchable record of all your client information. The most up-to-date contact details, WIP and receivables information is easily accessible so you can quickly get a snapshot of your current relationship with a client.

This module is also available on your smartphone for easy access to communications and your client's address. If receivables are overdue then it provides this information as well.



2. Job, workflow and resource driven solution

When staff open Practice Manager they're presented with the 'My Ordered Jobs' screen. These jobs are allocated by the firm Partner or Practice Manager to ensure accounting staff stay focused on what jobs to work on, and in what order. This alone will dramatically improve the efficiency and productivity of your team and firm.

Setting up jobs is efficient and easy, as jobs can be added individually, in bulk or even automatically. Specify default resource allocation by client, so whenever a new job is added for a client, Practice Manager automatically assigns the work including the minimum or agreed fees. This then automatically creates the write-up or write-off when invoicing.

Jobs

+ Add Job
+ Add Jobs in Bulk

All Jobs Open Jobs Weekly View My Ordered Jobs Jobs Assigned to Me Jobs I Worked On Unallocated Jobs In Progress Completed Closed Jobs

Search for

Tell me more

Job ID	Job Type	Period Ended	Code	Name	Hrs Worked	Hrs Allocated	Hrs to Go	Target End Date	Date Changed	Job Status
4061	TRUADM	Jan 28 2014	FRAN9629	Franklin Rickel Trust	20.7000	26.0000	5.3000	Jul 28 2014 (110)	Apr 07 2014	Finalising
3623	AA	Aug 28 2013	BRAB9503	Millenia Life Pty Ltd	22.2000	49.8000	27.6000	Aug 05 2014 (118)	Apr 08 2014	Active
3386	BUSSAP	Nov 28 2013	CHIL4281	Benesome Pty Ltd	21.7333	19.0000	-2.7333	May 14 2014 (35)	Apr 07 2014	Under Review
4576	BDEV		ABC100	ABC Pharmacy Pte Ltd		28.0000	28.0000	Apr 13 2014 (4)	Apr 16 2014	Allocated
2898	ACC	Nov 28 2013	WYNY0621	Circus World Pty Ltd	1.0833	3.0000	1.9167	Jul 28 2014 (110)	Apr 05 2014	Active

Personal Workflow

Get efficient with hours management

Job Workflow

Practice Manager was designed to enable **easy setup of recurring jobs** which make up 60% to 90% of most firm's revenue. With jobs set up, **your firm's workflow is automated** leaving just the allocation and ordering of jobs for firm staff.

Open Jobs + Add Job			
Job	Target End Date	Date Changed	Job Status
AA Aug 28 2013	Jun 28 2014 (74)	Apr 14 2014	Finalising
BDEV	Apr 13 2014 (-1)	Apr 16 2014	Allocated
TAX Aug 28 2013		Apr 9 2014	Not Yet In

Recurring Jobs + Add Recurring Job				
Job Type	Period Length	Next Period Ends	Create Job At	Target End Date
CORP	1 Year	Apr 28 2015	End of Period	1 Month After <input type="checkbox"/>
AA	1 Year	Aug 28 2014	End of Period	End of AA Month <input type="checkbox"/>
GST	GST Cycle	Jun 28 2013	Start of Period	1 Week After <input type="checkbox"/>

3. Real time capacity planning

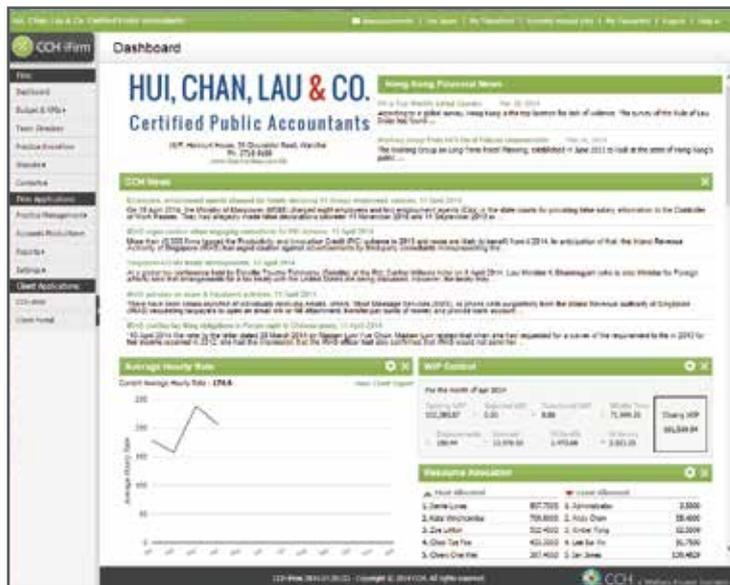
Practice Manager offers new breakthrough technology that 'automagically' adjusts real time capacity as timesheets are entered, jobs allocated and staff records updated. Imagine knowing exactly what staff resource is required each and every month of the year. Increase staff satisfaction with clear expectations of jobs, when they're required to be completed and remove capacity bottlenecks. With recurring jobs you can even view what future years look like for jobs, revenue and resourcing.

4. Agreed fees and flexible invoicing

Invoices can be created based on an agreed fee, minimum fee or by the hour for any entity within Practice Managers's central CRM Contact Database. Choose to email your invoices and receivables statements and pay for Practice Manager with just this saving alone!

5. Flexible and insightful reporting

Practice Manager has a wide range of reports to help you measure the performance of staff and your firm. Straight away when you log into CCH iFirm you will see on the Dashboard a number of reporting widgets. The Dashboard can be customised to display the areas of your practice that require your attention the most.



Powerful reports give you accurate numbers and knowledge to back up your instinctive feeling about jobs, staff and the firm's performance. Reports include cash flow & revenue, workflow, client profitability, employee, billing & debtors and job reports. All reports include a range of filtering options and in most cases you can drill down further to investigate in detail.

6. Automation, transparency, accountability

Communication is key when it comes to managing workflow and performance. With Practice Manager, automated emails are set up to follow rules (set up by your firm) to keep staff on track, and keep managers informed of progress. There are several different types of automated messages relating to resource allocation, job status, overdue jobs, variance notices and more.

By encouraging transparency throughout your firm, all staff are held accountable. Practice Manager makes it easy to see which jobs are being worked on, what stage they're at, and the firm's and individual staff efficiency.

7. Multiple Entities

It's common for accounting firms in Hong Kong to have multiple billing entities. Practice Manager works as a single integrated system with multiple entities for invoicing and receivables built in. The time and efficiency savings are significant.

8. Timesheets

To truly measure job, staff and firm performance, timesheets need to be entered. Practice Manager makes this intuitive, easy and customisable to your firm for the time unit you want to enter.

"Practice Manager has streamlined and simplified the management of jobs coming into the office. This has resulted in an easier allocation, prioritisation and tracking of jobs, and ultimately increases productivity. The transition process was also a surprisingly straight forward task as well, which saved considerable internal disruptions that normally occur when changing practice management systems. We see CCH iFirm as a business partner who will be with us as technology continues to evolve."

