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Practice Management



Star Rating

ProVantage Offers Unlimited Bill Formats Plus An Option To Produce Electronic Bills

A 'Create Entity' wizard streamlines setup for any new entity

By Mary Girsch-Bock

The ProVantage Total Client Asset Management System is built around the Entity Management System (EMS), a program that uses a unique object-oriented database to manage all information relevant to your business. Because everyone and everything that is entered in the EMS is

ProVantage Software, Inc.
800-843-2188
www.provantagesoftware.com

possible to access, managers and partners can access and analyze information that was difficult if not impossible to retrieve before.

To complete the system, ProVantage offers subsystems, which are modules designed to work in conjunction with EMS. These include Time and Cost Accounting, GL, AP, Practice Development, Client Billing and a complete Reporting subsystem.

The structure of EMS enables users to perform advanced queries, define client needs specific to their organization, and run detailed analysis on each client highlighting their unique parameters. After adding the various subsystems available, ProVantage becomes an indispensable tool for in-depth practice management.

Built to run in a true client/server environment, you will need Microsoft Windows NT Server 4.0+ or Windows 2000 Server, as well as Microsoft SQL Server 7+ and Microsoft Office 97+. Since I reviewed ProVantage via their terminal server, I cannot comment on ease or difficulty of installation. Because of its open architecture, ProVantage can share information with ODBC applications such as Microsoft Word, Excel, Access and a host of others.

Originally designed for the legal profession, ProVantage is now expanding its client list to include accountants and architects, as well as engineering firms and management/consulting companies.

ProVantage utilizes a standard toolbar along with tabs as its main navigational tools. To the left of the screen is the work area, where all options that are available to that particular user can be found. A status bar at the bottom of the screen shows current system status.

ProVantage offers a "Create Entity" wizard that streamlines setup for any new entity, whether that is a company, a new individual within an existing company, or a new individual within a new company. A conflict checker helps users avoid scheduling conflicts. A client/matter

maintenance screen can locate a particular client or specific matter in only seconds. ProVantage also offers unlimited bill formats along with an option to produce electronic bills. The billing function integrates seamlessly with the GL accounting functions. The GL can accommodate cash- or accrual-based accounting, or a variation of the two combined.

Some of the functions that place ProVantage at the top include the ability to analyze client referrals on revenue and the ability to assign pertinent dates to key relationships. The reporting capabilities are impressive, with ProVantage offering over 100 standard reports that are fully customizable. (The company also noted that the product now offers browser-based fee entry and online inquiry for financial statistics for clients and projects.)

ProVantage offers its customers a flexible support and training program as well as various consulting options.

ProVantage Total Client Asset Management System is a sophisticated system that offers an incredible array of features, yet it manages to remain user friendly with easy-to-navigate fields. If you are a mid-size to large company, take a look at this program. You won't be disappointed. ■ ★★★★★