



The Next Generation ProSystem fx[®] Suite

It's a whole new world.

Experience a truly integrated tax and accounting suite, with a central database of client and staff data. The next generation of the ProSystem fx[®] Suite was developed based on feedback and involvement from customers like you. In addition to the Software as a Service (SaaS) products available now, CCH is continuously developing new features and enhancements for the On-Premise version of the ProSystem fx Suite, giving you all the functionality you need to get the job done.

Centralized Management Brings Data Together

As the first tax and accounting suite to offer a common client database, the next generation of ProSystem fx helps you reduce data entry and simplify your client files. Store and manage your most vital client, firm and staff data in one place. With the ProSystem fx Suite at the heart of your firm, you will:

- **Reduce data entry and ensure accurate client information.** A common client database stores client information for multiple ProSystem fx applications. This single database streamlines and simplifies updates to client information, improves efficiency, and maintains consistency across the suite.
- **Streamline administrative processes and reporting.** A central Administration Manager lets you set up and maintain users, security, and preferences across the ProSystem fx Suite. It also helps you create reports across multiple ProSystem fx products.

Enhanced Integration Saves Time

Built from the ground up to offer true integration, the next generation of the ProSystem fx Suite makes sharing data between applications seamless. Our next generation solutions work together to fit into your workflow, so you can:

- **Find all the information you need in one convenient place.** Dashboards are populated with information from multiple ProSystem fx products, as well as many third-party products. These dashboards are a centralized starting point for every member of your staff.
- **Move seamlessly between applications.** You sign in just one time to access multiple ProSystem fx products.
- **Get up to speed faster with a familiar interface.** A common look and feel across multiple ProSystem fx applications improves ease of use. In addition, the ribbon-style menus leverages your staff's familiarity with Microsoft[®] Office 2007.

Enjoy Portability and Collaboration Benefits

CCH has partnered with Microsoft[®] to build the next generation ProSystem fx Suite on Microsoft's .NET 3.5 Framework. Initially available in a hosted, SaaS format, this new platform helps you:

- **Connect with your customers from anywhere, at any time.** The SaaS model is more flexible, adaptable and scalable, enabling 24/7 hosted service and quicker delivery of enhancements.
- **Simplify implementation.** A hosted solution ensures you have access to the most current version of the software, automatically.
- **Work more efficiently.** A Smart Client application provides richer user interfaces, more powerful performance and quick load times. The Smart Client can be installed easily on a large number of computers, with no user intervention.

It's a whole new world...
Starting now, the sky's the limit.

Meet the next generation of ProSystem fx.
Visit CCHGroup.com/TheNextGeneration
for more information.

ProSystem fx® Tax

The next generation of ProSystem fx® Tax makes your job easier by becoming a seamless part of your workflow, letting you customize the application to be transparent to the way you work. With numerous new leading edge-features, you will:

- **Simplify on-screen review.** Increase the efficiency of your on-screen reviews with features that will include tickmarks and diagnostic sign-offs.
- **Create customized views.** Customize the information you want to see about your returns with enhanced Return Manager functionality.
- **Improve client communications.** Create professional correspondence that you can build from templates and edit in Microsoft® Word. You'll have complete control over your correspondence.
- **Save time when printing returns.** Create print sets, send to multiple destinations, insert objects and add watermarks.

ProSystem fx® Document

With an intuitive, Microsoft® Windows-style user interface for improved searchability and usability, the next generation of ProSystem fx® Document helps you:

- **Streamline your document management.** Simultaneously import multiple files or save any document to multiple entities, clients or projects.
- **Find documents more easily.** Effortlessly find documents and files using intuitive search functionality similar to Microsoft® Outlook®.
- **Manage your email messages.** Group email threads and manage email history to gain a clearer picture of your firm's correspondence with clients.

ProSystem fx® Practice

Simplify your firm management, gain insight into your firm's activity and improve productivity with the next generation of ProSystem fx® Practice. With the latest version of Practice, you will be able to:

- **View all Practice data in one place.** Configure various views in the centralized ProSystem fx Suite dashboard to view important practice information, such as client billing and A/R notes, notifications of bills ready for review, employee productivity graphs, and other employee statistics.
- **Easily manage time entry.** Set up a review process for employee managers, enter estimated time remaining on projects, capture information for sales tax reporting, enter reasons for overriding a standard rate, or view CPE tracking and historic bank hour entries.
- **Simplify billing and invoicing.** Use Practice to bill groups of clients, post multiple invoices for one client, and more.

ProSystem fx® Portal

ProSystem fx® Portal lets you streamline the exchange of information between your firm and your clients. A number of states have already passed laws prohibiting firms from sending confidential information via unencrypted email, and more are expected to follow. Rather than implement complicated data encryption processes, your firm can now utilize Portal's secure, digital point of access to safely store and exchange files in compliance with these laws.

ProSystem fx® Workstream

Gain immediate productivity increases that translate into more billable hours and higher firm profits with ProSystem fx® Workstream, an integral component of your complete digital office. Workstream will help automate and manage your firm's processes, as well as more accurately budget hours so projects are completed on time.

Training and Consulting Options to Fit Your Needs

CCH also offers valuable training, consulting and CPE to keep you ahead of the curve. From live training and consulting, to on-demand online learning, CCH provides the tools that everyone, from new hires to seasoned pros, needs to strengthen their abilities. Visit CCHGroup.com/Training to learn more.

The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at CCHGroup.com/TheNextGeneration. If you plan to use multiple ProSystem fx Suite products within the same system, call 800-PFX-9998 (800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.

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the Next Generation
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