



ProSystem fx® Portal

Protect the exchange of confidential documents within your company while fostering communication and increasing efficiency between departments.

ProSystem fx® Portal allows you to improve efficiency through the effortless and secure exchange of files between company departments, subsidiaries, remote office locations, shareholders and other business partners. With the Portal component of the CorpSystem Suite, you gain bi-directional file exchange capabilities that make it easy for you to securely deliver and receive company documents.

Portals are an electronic storage space in which files can be easily uploaded, downloaded and/or stored, while maximizing the security of confidential information. Sensitive files regarding business agreements, mergers/acquisitions and customer information are placed at a high risk of interception by an unwanted third-party if exchanged through email — a perilous option of confidential document exchange which companies should not consider. Avoid the detrimental effects of compromised private company data and experience the confidence of knowing your files are protected with ProSystem fx Portal.

IMPROVE COLLABORATION

With Portal, your company will experience unmatched convenience through instant access to important documents — including tax returns, financial statements and source documents. Meanwhile, your company will benefit from reduced overhead and greater efficiency.

Portal helps your company and its decentralized office locations:

- Access vital documents immediately from any location with Internet access via a secure, private repository.
- Organize documents electronically in cabinets and folders that mirror the way you store paper documents.
- Easily upload documents of all sizes without relying on an FTP server.
- Designate files as Read-Only or Read/Write for easier access and greater security.
- Check out documents to prevent other users from editing while they are being updated.
- Maintain previous file versions in the document history.
- Search, filter and display documents by file type, title, creator, keyword and more.

EXPAND COMMUNICATION

Portal lets you share PDF files, Web pages, hyperlinks, Microsoft® Excel spreadsheets, Microsoft® Visio diagrams, Microsoft® Word documents, PowerPoint® presentations, and financial software data files, among others.

If your company has clients, utilizing Portal will give your client service a boost by allowing you quick, efficient and secure bi-directional exchange of documents.

COLLABORATION MADE SIMPLE

Imagine facilitating collaboration between company departments — instantly. With Portal, employees can take advantage of instant document access by effortlessly exchanging files with each other, resulting in increased productivity and efficiency.

- **Tax Returns** — A single mouse click in Portal makes an entire tax return available for review by an outside CPA, or a traveling/telecommuting tax director. After reviewing the return, send confidential review comments back or simply sign the *e-filing* release and scan it back. The return is now ready for electronic filing.
- **Financial Records** — Improve communication between decentralized locations by utilizing Portal to instantly share important documents. Finance departments often need the prior two years' tax returns to secure bank loans or for legal purposes. Simply publish the tax returns and source documents to Portal, and anyone you designate can securely access them at any time.

DELIVERING AN OPTIMAL SOLUTION

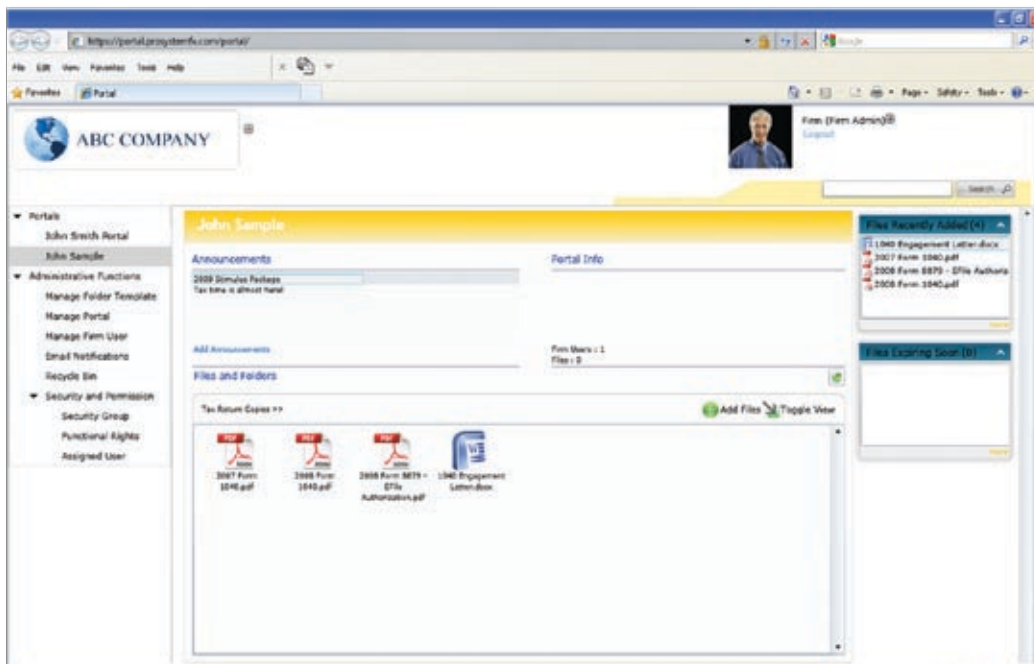
Portal is a stand-alone solution, meaning that any size company utilizing any software can use it as a secure, convenient, and effortless way to exchange files and foster collaboration between business partners, departments and remote offices.

- **Portals** — Portals deliver full portal capabilities required to service a company with multiple locations, departments and business partners. Portals include full bi-directional capability, the ability to add multiple users, unlimited storage space (up to the storage limit licensed by the company), and the option to provide secure Client Areas (licensed separately).
- **Client Areas** — If you operate a business that involves working with a multitude of clients, such as a bank, wealth management firm or insurance company, this Portal combination will best suit your needs. "Client Areas" are designed for clients to have a secure portal area for their external business or investment activities. While the Basic and Premier Portals provide access to documents by both client users and your company's staff, the Client Area is accessible only by client users. Client Portals can be made available to clients by the company as a value-add service or to help differentiate the company from the competition.

CCH INTEGRATION

Portal tightly integrates with the CorpSystem Suite of products, including ProSystem fx Tax, CorpSystem Workpaper Manager, and ProSystem fx Document.


When implemented in conjunction with the SaaS version of ProSystem fx Document 4, additional Portal functionality includes the ability to create custom folders, file versioning capability, and full CorpSystem Suite integration provided through Document.



The standalone Portal application connects you to your business partners by providing a digital point of access for all of your company's files.

For more information on
ProSystem fx® Portal
call 1-866-513-CORP (1-866-513-2677)
or visit CorpSystem.com

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Visit CCHGroup.com/CorpSystem for the most up-to-date information
about product enhancements, features, system requirements and more.

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