



ProSystem fx[®] Project Management

The due date monitoring and budget management component of the CorpSystem suite

Tax • ActiveData • Document ASP • Workpaper Manager • Fixed Assets

Project Management provides due date monitoring and detailed budget management tools to help you track compliance returns and manage other multi-step jobs such as audits or IT consulting. With Project Management, your company will have access to powerful tools that help manage projects more efficiently. This will allow you to:

- Create and track project status, due dates, and extension dates based upon company or entity information.
- Create projects from an internal forms library of due dates or add customized forms such as SEC reporting to your company's library on other accounting projects.
- Use the Tax Forms library to simplify due date monitoring by providing statutory due dates and extension dates.
- Save custom views and share those views with other team members. You can also restrict access for personal use.
- Set Proactive Notifications by email to automatically alert management of impending or missed milestones or budgets. This allows remote monitoring of pending deadlines or completed tasks while away from the office.
- Update multiple fields on multiple projects in one easy step.
- Copy projects based on any user-defined criteria, including group, assignments, or entity.
- Select individual projects or groups of projects for rollover.
- Integrate with Microsoft Outlook[®]. Contact records and bio information can be linked with Outlook and updated as changes are made in Project company records.
- Integrate with other products in the CorpSystem suite, including Tax, Workpaper Manager and Document.

REPORTING

Project Management's flexible reporting capabilities allow your company to generate standard reports in both detail and summary format, as well as custom reports through its internal report writer. You have the ability to:

- Broadly or narrowly define report information.
- Use a built-in Custom Report Wizard for quick report writing.
- Export to other software.
- Export to PDF file format.
- Customize the Report Writer.



ADVANTAGE DATABASE SERVER

Project Management provides a state-of-the-art Client/Server database to ensure high performance and trouble-free operation regardless of your company's size. Advantage Database Server technology results in:

- **Lower Bandwidth Needs** – Increased performance of all your company's software applications running on the network.
- **Enhanced Database Stability** – An event such as a power failure at a workstation will not compromise the integrity of the data on the server, eliminating the need to rebuild databases.
- **Powerful Transaction Processing** – Guards against partial updates when transaction processing is interrupted, reducing or even eliminating recovery steps.
- **Cost-efficiency** – Implementing, configuring, and maintaining Advantage database technology is economical.

CUSTOMIZATION

Treat your small projects with the same attention to detail you give your largest projects. Consolidate, organize, store, and retrieve information quickly and easily, eliminating the need for multiple databases. You get:

- Up to 250 custom fields each for entities, projects, and employees.
- Seven different data types for validation and minimized entry errors.
- Instant access from multiple areas within the software.
- Communications tracking.
- User-defined reports available on all custom fields.

IMPLEMENTATION TRAINING AND CONVERSION SERVICES

CCH ensures your transition to CorpSystem products trouble-free with Implementation Training you can attend from the convenience of your office or home.

SYSTEM REQUIREMENTS

- File Server** 1 GB+ of RAM required for file servers
Novell, Microsoft Windows NT, Windows 2000, Windows 2003 (32 bit only), Redhat Linux.
- Workstation** 100% IBM-compatible Pentium PC, PII or higher required
512+ MB or RAM
Windows 2000, Windows XP, Windows 2003, Windows Vista, Windows 2008 (32 and 64 bit operating systems are both supported with version 8.1 and higher)

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

*The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at CCHGroup.com/CorpSystemProjectManagement.
If you plan to use multiple CorpSystem Office products within the same system, call 1-866-513-CORP (1-866-513-2677) and ask to speak to your sales representative about whether or not your system availability is adequate.*

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