



ProSystem fx® Engagement

Simplify Your Tax and Audit Engagement Workflows

CCH is Advancing Business with Best in Process™ Solutions, Delivering Faster Answers and Better Results.

ProSystem fx® Engagement puts the power of paperless engagements in your hands. The software streamlines your processes at all stages of an engagement, with integrated workflow features for project tracking, reporting, review, sign-off, and archiving. Enjoy instant access to engagement binders, with no concern of conflicting copies, resulting in a significantly more efficient engagement. This paperless solution is recommended by more customers than any other solution on the market.

Efficient Collaboration has Never Been Easier

ProSystem fx Engagement facilitates teamwork with its exceptional collaboration tools and functionality. With its well-designed tools and processes, you can:

- Allow multiple staff members to work on an engagement at once by checking out only the workpapers you need.
- Be confident you're looking at the most current version of every document by synchronizing work from any location.
- Email an entire binder with one click, or collaborate with customers using ProSystem fx® Portal.
- Enjoy compatibility with Microsoft® Office programs with functions like import and export capabilities, dynamic linking, and enhanced copy-and-paste functionality.
- Import and integrate trial balance data from virtually any accounting system, including QuickBooks®, via a simple Microsoft® Excel® import process.
- Experience seamless integration with other CCH audit titles, such as U.S. GAAP Financial Statement Disclosure Examples, a comprehensive library of footnotes accessible directly from your financial statement.

Protect Data with Flexible Security Features

With Engagement, you control who has access to sensitive client information. Be confident that you're in compliance with regulations by using security features that allow you to:

- Ensure file integrity by securely managing every document from inside the program. Avoid unintentional or unauthorized changes by setting access rights for all of your staff groups.
- Obtain secure online sign-offs by preparer and reviewer and lock documents after final review.
- Manage binder and workpaper completion dates to ensure compliance with 45- or 60-day requirements.

Automate Time-Consuming Tasks

Engagement saves you time and money by simplifying your workflow with automated tasks.

- Automate first-year engagements with customized binder templates.
- Roll forward an entire engagement with a single mouse click.
- Simplify tax return preparation by linking financial data between ProSystem fx® Tax products and Engagement, so trial balance updates are reflected automatically in the tax program.
- Easily finalize and archive the engagement, ensuring file security.

The Latest Innovations in Paperless Integration

Experience the benefits of a digital office. Whether it's a tax or audit engagement, with ProSystem fx Engagement, your firm will gain the convenience of instantly accessible workpapers. Engagement lets you:

- Store and access engagement binders in a shared file room with a familiar interface.
- Scan documents directly into the correct engagement binder.
- Create PDF files from any application, and seamlessly store them in paperless binders.
- Send files back and forth between ProSystem fx® Document, and share Engagement workpaper files with customers using ProSystem fx Portal.

Useful Functionality at Every Step

Today's accounting profession is in a constant state of change, with firms being asked to deliver more, work more efficiently, and stand up to a higher level of accountability. ProSystem fx Engagement offers clear advantages, providing the highest level of security, maintaining data integrity regardless of the amount of work moving through an engagement, and helping you comply with evolving industry regulations. Here is what you will experience:

Set-Up — One-time staff set-up is simple, reducing the need for redundant data entry. The flexible administration module allows you to add entire teams to binders, and security levels can be individualized for each staff member.

Compile and Organize Data — Workpapers are stored in Engagement's intuitive electronic filing cabinets and binder system. You can import, export, email, and store PDF files from any application. Best of all, Engagement's robust trial balance system and other workpapers are built on Microsoft® Word and Excel®.

Collaborate and Review — Share information and synchronize binders from any location. You can manage the sign-off process electronically. The Current Editor feature ensures that only one person can make changes at a time.

Create Reports — Create multiple financial statements for any engagement. Trial balance data can be linked to other applications, making it easy to provide additional services, like tax preparation with ProSystem fx Tax.

Finalize Binders — You can finalize and archive with just a few clicks. Server space is maximized and calculations are locked down and secure.

Archive Binders — Store the archived binder in ProSystem fx Document with assigned retention periods and indexing. Once the retention period is reached, document destruction can safely take place to ensure proper regulations compliance.

Roll Forward — Roll forward data from year to year, automatically populating financial statements and workpapers with current dates, account balances, and variances. Previously assigned staff will continue to be tracked in the new year.

Integrated CCH Products Contribute to a Seamless Workflow

In addition to the companion products that are key to a proficient audit management system, other CCH products work in concert with Engagement, breaking down access barriers and driving higher levels of convenience and efficiency across your work:

- **ProSystem fx® Knowledge Coach** — Now there's knowledge-based methodology through a dynamic GPS for auditors that lets you add and link risks to specific audit steps with confidence, providing a more efficient and higher quality audit for your clients while leaving you understanding them better than ever before!
- **Accounting Research Manager®** — Add value to your clients by finding the accounting and audit research you need — including summarized topics and links to all relevant materials — in a fraction of the time and all in one place. You'll have access to near real-time interpretive guidance and authoritative literature written by accounting industry leaders.
- **ProSystem fx® Portal** — Collaborate with clients instantly and securely through the cloud, delivering information from anywhere at any time. Enable mobility to drive firm efficiencies.
- **ProSystem fx® ActiveData** — Easy audit fraud detection and analysis is now accessible through Microsoft® Excel®, reducing training time and driving a quick ROI! Immediately transform hard-to-use data into usable data for the core of your business.
- **ProSystem fx® PDFlyer™** — Simplify the everyday process of working with Adobe® Acrobat® files through built-in functionality designed specifically for CPAs.
- **ProSystem fx® Document** — Save time and money with a digital document management solution that provides effortless searching and integration with the ProSystem fx® Suite.
- **CCH® KnowledgeConnect™** — Drive firm efficiencies and encourage team collaboration through a searchable database designed to reduce repetitive Q&A, easily identify subject-matter experts, and share information across communities.

Content and Methodology Come Together

Unlike traditional checklist-based methodology, CCH's Knowledge-Based Audit™ (KBA) methodology helps auditors plan and execute in a way that results in a higher quality audit where the client is understood better than ever before.

For a complete list of available titles visit CCHGroup.com/AuditTitles.

For more information on
ProSystem fx® Engagement, call
800-PFX-9998 (800-739-9998) or visit
CCHGroup.com/ProSystemEngagement

The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at CCHGroup.com/ProSystemEngagement. 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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