



ProSystem fx® Portal

Mitigate Risk, Support Client Privacy and Gain a Competitive Edge by Delivering Better Client Service

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

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 utilize a safe, secure portal to comply with these laws.

Portals are convenient electronic storage spaces in which files can be effortlessly uploaded, downloaded and/or stored, while maximizing the security of sensitive information. With ProSystem fx® Portal, you gain bi-directional file exchange capabilities that make it easy for you to securely deliver and receive client documents, facilitating collaboration and supporting the upload of even the largest files.

Improved Client Service

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

Portal helps you and your clients:

- Access vital documents immediately from any location with Internet access via a secure, private repository.
- Organize documents in electronic 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.
- In addition to the standard, full-featured user interface, Portal now provides users an optional access method for those that want only simple upload/download functionality via the new Simplified User Interface.
- Extend access rights and security with Folder Level Security.

Expand Communication

With ProSystem fx Portal, you can share PDF files, Web pages, hyperlinks, Microsoft® Excel® spreadsheets, Microsoft® Visio® diagrams, Microsoft® Word documents, PowerPoint® presentations and financial software data files, among others. For example, your clients can now upload their QuickBooks® files to the Portal, eliminating the need to exchange DVDs.

“We can no longer email and fax returns to clients because of government regulations. For our firm, ProSystem fx Portal fit a required need, and it was easy to use. Our clients love it, and it saved me money because I don’t have to print covers anymore.”

— Phil Juravel,
Managing Partner, Juravel & Company,
Alpharetta, GA

Collaboration Made Simple

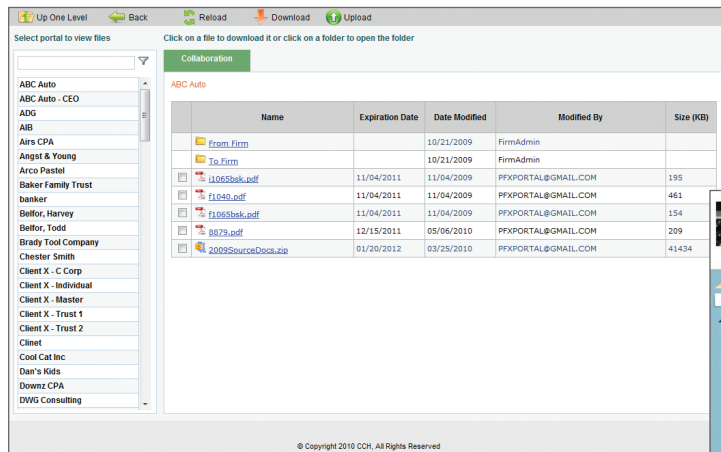
Taking advantage of instant access lets your clients view their documents with minimal effort on the part of your firm.

- **Tax Returns** — With ProSystem fx Portal, a single mouse click makes an entire tax return available for the client’s review. After reviewing the return, your client simply signs the e-filing release and faxes it to you. The return is now ready for electronic filing.
- **Financial Records** — Clients 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 your client can securely access them at any time.

CCH® Integration

ProSystem fx Portal tightly integrates with other members of the ProSystem fx® Suite of products, including Tax, Engagement and Document.

When implemented in conjunction with ProSystem fx® Document, additional Portal functionality will include file versioning capability and full ProSystem fx Suite integration provided through Document.



ProSystem fx Portal offers users an optional Simplified User Interface access method with a simpler feature set.

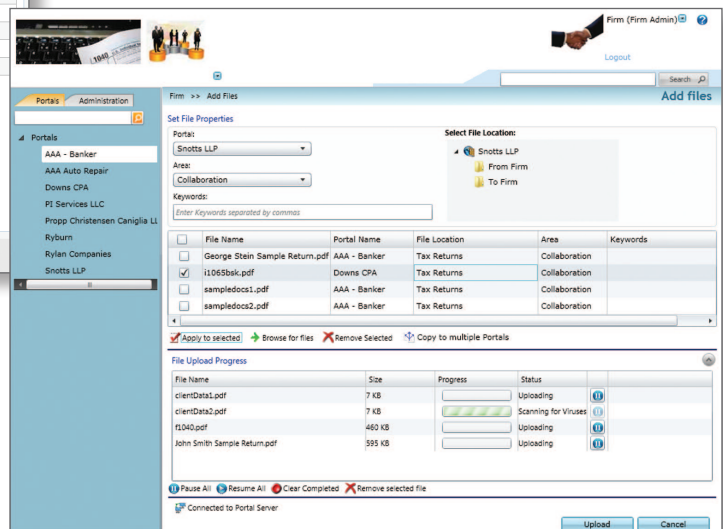
Delivering an Optimal Solution

ProSystem fx Portal is a stand alone solution, meaning that any size firm utilizing any software can use it as a secure, convenient and effortless way to exchange files and collaborate with clients. Portal functionality is not limited to sharing files with clients — it can also be used to facilitate collaboration among firm staff and for external business transactions.

- **Portals** — Portals deliver full capabilities required to service a firm’s business and larger individual clients. Portals include full bi-directional capability, the ability to add multiple client users, unlimited storage space (up to the storage limit licensed by the firm), and the option to provide secure Client Areas (licensed separately).
- **Client Areas** — These are designed for clients to have a secure portal area for their external business or investment activities. The Client Area is accessible only by client users and the external entity. Client Portals can be made available to clients by the firm as a value-add service or to help differentiate the firm from the competition.

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/ProSystemPortalSaaS. 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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