CCH
a Wolters Kluwer business

ProSystem *fx*® Document (SaaS)

Access Firm Files — Anytime, Anywhere — with Cloud-Based Document Management

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

ProSystem *fx*® Document (SaaS) is a full-featured document management system that provides a secure, scalable, and efficient way for your firm to store, search for, and use documents while facilitating digital workflows. The cloud-based version of ProSystem *fx* Document was designed from the ground up to take optimal advantage of an online environment so you can work smarter and more efficiently.

Available either stand alone or integrated with the feature-rich ProSystem *fx*® Suite, Document (SaaS) delivers robust functionality via a dynamic, centralized, hosted platform. Running on powerful smart client software, the cloud version of Document is quickly deployed and automatically updated, instantly saving you valuable time.

Provide Better Client Service

Providing prompt client service is critical to your firm's continued success, and having client information accessible will elevate your client service to the highest level.

With ProSystem *fx* Document (SaaS), you'll benefit from:

- **Accurately Filed Documents** — With the fast and intuitive Outlook-like search feature, locating a file has never been easier and more efficient. No more frustrations from misfiled paper or digital files, and no more playing phone tag with clients.
- **Around-the-Clock Access** — The cloud offering of ProSystem *fx* Document provides 24/7 access to firm documents, expanding your office to any location with an Internet connection.

When integrated with the rest of the ProSystem *fx* Suite, your complete virtual office is only a mouse click away.

Designed for Increased Efficiency

With all files centrally located in one organized digital repository, you'll save a significant amount of time searching for files previously stored in multiple locations.

Greater efficiency is possible through:

- Convenient integration with the other cloud products: ProSystem *fx*® Tax (SaaS), Practice (SaaS), Workstream and Portal, as well as Microsoft® Office.
- Elimination of duplicate data entry by utilizing the common client database and administration manager.
- Instant access to stored documents so you always have what you need, when you need it.

Minimize IT Overhead Costs

Because ProSystem *fx* Document (SaaS) resides on CCH servers in our secure Class 4 data center, your firm will not need to invest in additional hardware or IT resources. In addition to lower up-front costs, solutions residing in the cloud are less costly to maintain due to the accelerated delivery of updates and enhancements and greater scalability to meet changing business needs.

> "You can relax, you can do more things in your personal life as well, since SaaS technology allows you to be so much more efficient at work. And the best part is, your staff is happier because they can do in 50 hours what they used to do in 70 hours. We can work four and a half day work weeks, we can have a life balance — and technology has brought those abilities to us."
>
> — Michael Parmet,
> *Managing Partner,*
> *Parmet, Chapman & Madsen PC*

ProSystem *fx*® Document (SaaS)

Protect Your Firm's Most Valuable Asset

Ensuring the confidentiality of your client data is the highest priority, both for your firm and for CCH. With ProSystem *fx* Document, you can rest assured that your sensitive files are securely protected. The SaaS version of Document accomplishes this through:

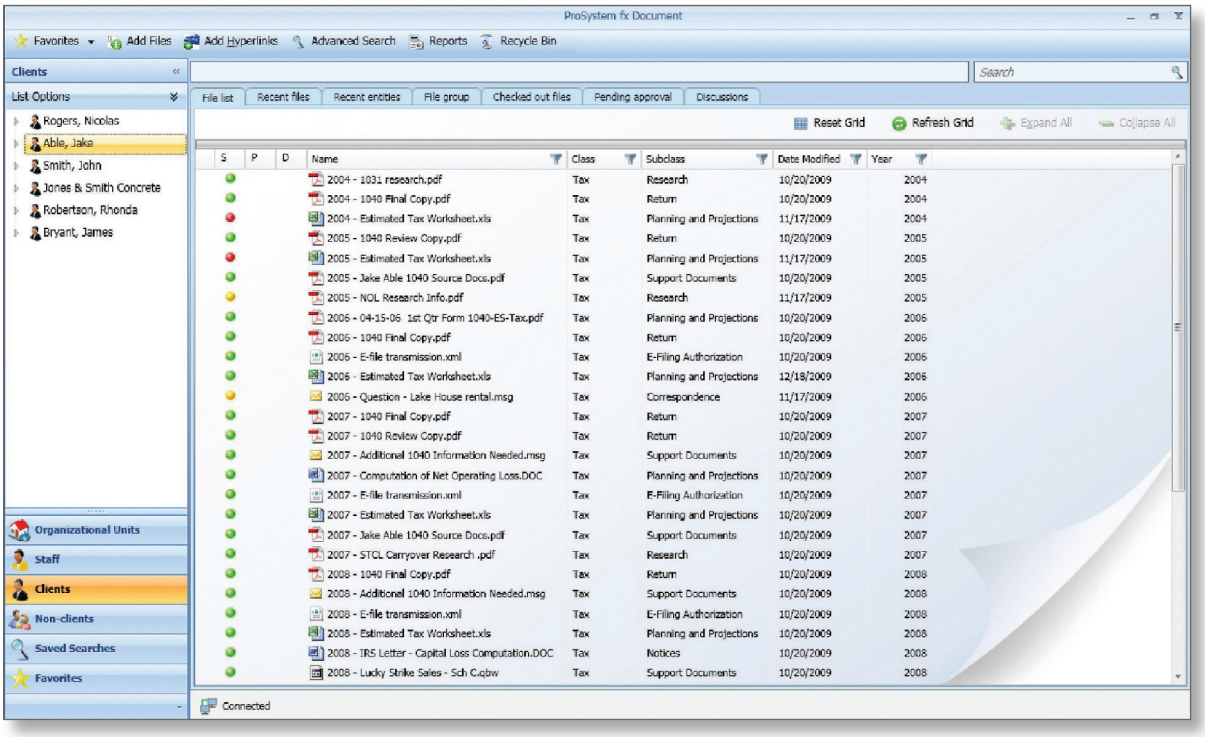
- **Password-Protected Access** — Document utilizes 256-bit, Secure Socket Layer (SSL) encryption with password protected access. Since documents are hosted at the Business Logic Layer, users can only log in with a unique username and password.
- **Encrypted Information** — Files are encrypted before being passed over the Internet.
- **Automatic Virus Scan** — For added protection, files are automatically scanned for viruses before being stored in the document file system. All files are maintained behind secure firewalls to protect against outside intruders.

Tight Integration Yields Improved Workflows

ProSystem *fx* Document (SaaS) tightly integrates with the rest of the next generation ProSystem *fx* products, including ProSystem *fx* Tax (SaaS), Practice (SaaS), Workstream and Portal. This integration allows you to take full advantage of the ProSystem *fx* Suite common client database and administration manager, providing time savings via single login capability, eliminating errors by ensuring consistency of common information across multiple products, and significantly reducing duplicated efforts. And since the entire ProSystem *fx* Suite was designed with integration in mind, consistent user interfaces and the customizable Suite dashboard make navigation a breeze.

Delivering an Optimal Solution

In the end, it is all about finding solutions that work. As a centralized location for storing, accessing and managing all your firm's documents, ProSystem *fx* Document (SaaS) is the piece that brings your paperless office together. Contact your CCH sales representative today to learn more.



With all of your documents in a central repository — including tax returns, client correspondence, employee records and email messages — you'll be able to help your clients in record time.

For more information on
ProSystem *fx*® Document
call **800-PFX-9998** (800-739-9998) or visit
CCHGroup.com/ProSystemDocumentSaaS

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