



ProSystem fx® Document

Minimize the Costs Associated with Managing Paper Documents

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

ProSystem fx® Document manages the full range of documents found in an accounting practice — from tax returns to client correspondence, employee records and email — reducing the costs associated with creating and storing paper documents. By having all your documents in one central, searchable repository, you'll be ready to deliver better client service by minimizing time spent searching for binders or pieces of paper.

Document Storage and Retention

In addition to increased efficiency and cost savings, ProSystem fx Document also provides the risk mitigation you need for document storage and retention. Comply with regulations and standards, all in the background of your day-to-day work, and provide your firm with:

- Automated document retention capability that lets you implement a consistent firm-wide retention policy.
- Streamlined workflows, resulting in improved productivity.
- Secure, remote, 24/7 access to your client files.
- Freedom from dependence on physical pieces of paper. Storing your documents in digital format provides the ability to back up all your client files. When properly stored, this backup will keep your firm's content safe in the event of a disaster.

Redefining Document Management

Finding files with ProSystem fx Document is fast and easy. Client, document and word searches are combined on one screen, letting you search using any combination of parameters.

Improve your efficiency by evolving the way you manage files, including application data files. With Document's Extended Storage Area, you can manage the application files created by ProSystem fx® Fixed Assets and QuickBooks® — a unique feature of ProSystem fx Document.

The Extended Storage Area also allows you to track application file history, apply retention periods, and include them in your search results. Just set your preferences in ProSystem fx Document to store selected application files in Extended Storage — no additional management is necessary.

Award-Winning Email Management

In addition to storing your workpapers, data files, and back-office documentation, ProSystem fx Document also helps you better manage your email by allowing you to:

- Drag and drop emails and attachments directly to ProSystem fx Document from within Microsoft® Outlook®.
- Enhance collaboration within the firm by saving pertinent client emails to ProSystem fx Document, making them accessible to everyone.
- Use ProSystem fx Document to ensure compliance with regulations related to email retention and destruction.
- Manage the size of exchange servers by archiving emails in a secure, searchable location.
- Eliminate risks related to local hard drive crashes or laptop thefts by storing emails outside of archived email storage.

"ProSystem fx Document is a home run... Over the past five years [of] using Document, we have successfully consolidated staff, we have no off-site storage, our last paper files are ready for destruction and most importantly, it's almost impossible to lose a file."

— Richard W. Jackson, CPA,
Member, Jackson Coles, PLLC

Maximize Productivity with Integration

CCH® integration allows your staff to spend less time looking for the information they need and more time focusing on getting the job done.

For example, you can:

- Scan, organize and bookmark client source documents using ProSystem fx® Scan, then automatically import them to ProSystem fx Document in one step. Your client source documents are then searchable and accessible to everyone at your firm.
- Easily move or copy files to or from ProSystem fx® Engagement, allowing your firm instant access to client deliverables and providing improved management of permanent files.
- Print returns directly from ProSystem fx® Tax to the correct client in ProSystem fx Document.

The integration between the ProSystem fx Suite and Microsoft® Office allows you to maintain completely paperless processes. This unmatched integration offers support for all firm workflows including tax returns, accounting and audit engagements, special projects and back-office processes such as Human Resources.

Streamline Your Workflow

Customize your ProSystem fx Document homepage to support the way you work every day.

Start by effortlessly configuring a display of 1–6 panels. Select how you want the panels organized, and even choose to make the search screen your homepage. All panels are displayed in the left navigation bar — readily available for full-screen viewing.

The most widely-used functions — such as locking, check-out, check-in, versioning, direct editing, discussions and overdue notifications — are readily accessible, improving your efficiency by helping you easily manage your documents.

Enhance Communication — Internally and with Clients

ProSystem fx Document will enhance communication both within your firm and with your clients. For example, convenient Client and Document Discussion features allow the entire firm to communicate about specific documents or clients.

Add ProSystem fx® Portal to the mix, and you have a reliable, secure method of exchanging information and collaborating with your clients. Simply upload documents to folders that have customizable names. Files are readily available upon Portal login, and can be designated as Read Only or Read/Write for greater control and security.

CCH Works with You to Achieve a Digital Workflow

CCH offers a full range of services to make your transition to a paperless environment as smooth and productive as possible. We'll guide you through installation and provide firm-wide best practices through training and consulting. In fact, our consultants will even conduct a personalized survey to determine if any special preparation is needed for your firm to implement ProSystem fx Document.

It's time to reduce the costs associated with creating, storing and managing paper documents, while achieving dramatic improvements in workflow and client service. Take the first step with ProSystem fx Document, and gain a competitive edge today!

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

All trademarks and copyrights are property of their respective owners.

Join us on  at CCHGroup.com/Social



CCH

a Wolters Kluwer business

800-PFX-9998 (800-739-9998)
CCHGroup.com

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