



ProSystem fx[®] Document

Access to company files — anytime, anywhere —
with the next generation of document management.

Delivered as both an on-premise and software as a service (SaaS) solution, ProSystem fx[®] Document provides a secure way of storing, searching for and accessing company files while increasing efficiency and facilitating digital workflows.

Why SaaS: Superior Technology, Lower Costs

With the SaaS version of Document, your company, business partners, subsidiaries and shareholders will benefit from faster, more advanced technology that requires lower up-front maintenance costs compared to the on-premise version.

- Because it resides on CCH servers in our secure Class 4 data center, your company will not need to invest in additional hardware or IT resources to keep Document (SaaS) running.
- Maintenance is cheaper thanks to the accelerated delivery of updates and enhancements and greater scalability to meet your company's changing business needs.

Additionally, with the next generation of Document, electronically organizing the full range of documents found in your department — from tax returns to interdepartmental correspondence — has never been faster and easier, resulting in cost savings associated with creating and storing paper documents.

Designed for Increased Efficiency

Document provides the tools needed to help your company achieve maximum levels of efficiency and productivity. Because all files are centrally located in one organized digital repository, significant time will be saved searching for files previously stored in multiple locations.

Greater efficiency is possible through:

- **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.
- **Round-the-clock access to what you need, when you need it** — Now you can expand your office to any location with an Internet connection thanks to 24/7 access to company documents.

- **Convenient integration** — For optimal efficiency, take advantage of the powerful integration of Document and ProSystem fx[®] Tax. Document also integrates with Microsoft[®] Office.
- **Reduced data entry** — The common client database and administration manager automatically update information across all applications so you only have to enter it once.

Ensure Compliance with Secure Document Storage

Ensuring the confidentiality of your company data and remaining compliant with Sarbanes-Oxley and document retention and security regulation is the highest priority, both for you and for CCH. With the next generation of Document, you can rest assured that your documents are secure thanks to:

- **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 and while being stored within Document.
- **Automatic virus scan** — For added protection, files are automatically scanned for viruses before being uploaded. All files are maintained behind secure firewalls to protect against outside intruders.

Tight Integration Yields Improved Workflows

ProSystem fx Document tightly integrates with ProSystem fx Tax, allowing you to quickly and easily print returns from Tax to Document. You will also be able to take full advantage of the common client database and administration manager, providing time savings via single login capability, eliminating errors by ensuring consistency of common information across the Suite, and significantly reducing duplicated efforts.

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 company documents, the next generation of Document is the piece that brings your digital office together. Contact your CCH sales representative today to learn more.

Maximize Your ROI Through Training

CCH offers a full range of services to make your implementation of ProSystem fx Document as smooth as possible. These services include training and best practices consulting. Our consultants conduct a survey to ensure all your needs are identified prior to implementing ProSystem fx Document.

Enjoy Maximum Integration with Microsoft[®] Office and CCH Solutions

ProSystem fx Document integrates with all of the products in the Microsoft[®] Office suite, including Word, Excel[®], Access[®], PowerPoint[®] and Outlook[®]. You can easily save any Office file directly into ProSystem fx Document, and launch any Office application directly from Document. In addition, any file that you would save to Windows[®] Explorer can effortlessly be saved in Document instead. Imagine the time you'll save by having all of your files in one place.

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