



# ProSystem fx® Scan (SaaS) and AutoFlow Technology™

Save up to 30 minutes per tax return and reach new levels of productivity.

Introducing ProSystem fx® Scan and AutoFlow Technology...in the Cloud! Save up to 30 minutes per tax return, minimize costs, leverage administrative staff, and reach new levels of productivity with CCH's digital data scanning and 1040 import solution.

## The power of ProSystem fx Scan and AutoFlow is now available to you in the Cloud!

Scan and AutoFlow — the award-winning 1040 workflow tools that have helped thousands of CPA firms save time and improve efficiency — are now within easy reach thanks to their debut online.

ProSystem fx Scan (SaaS) is a secure web-based solution that automates the time consuming tasks of gathering, extracting, organizing and bookmarking tax data from scanned source documents and exporting and populating that data into ProSystem fx® Tax. Now with the Cloud version of Scan, you'll enjoy all the proven benefits of Scan with the added convenience and cost savings associated with CCH providing your IT infrastructure. It's easy to use and will help your practice achieve immediate, dramatic improvements in efficiency and productivity.

## Benefit from Technologies Other Firms Are Using to Reduce Paper and Go Digital

With just a scanner, you can be up-and-running quickly on ProSystem fx Scan (SaaS). No additional servers or IT expertise is required. A CCH account manager or CCH-hosted webinar will help you understand whether Scan (On-premise) or Scan (SaaS) is right for you. If Scan (SaaS) is right for your firm, all you'll need to do is determine how many 1040s you anticipate preparing this tax season, undergo easy-to-understand web-based training, and start down the road to an easier, more efficient tax workflow.

## The ProSystem fx Scan Process Overview

ProSystem fx Scan quickly and reliably takes the proverbial "shoebox" of unsorted client information, determines what each item is, and outputs the documents to a single, organized and bookmarked PDF file. Coupled with AutoFlow Technology — the process that extracts data from 1040 client source documents to be imported into the return — ProSystem fx Scan, ProSystem fx Tax, and PDFlyer™ will provide a complete digital 1040 tax preparation solution for your firm.

## Here's How It Works

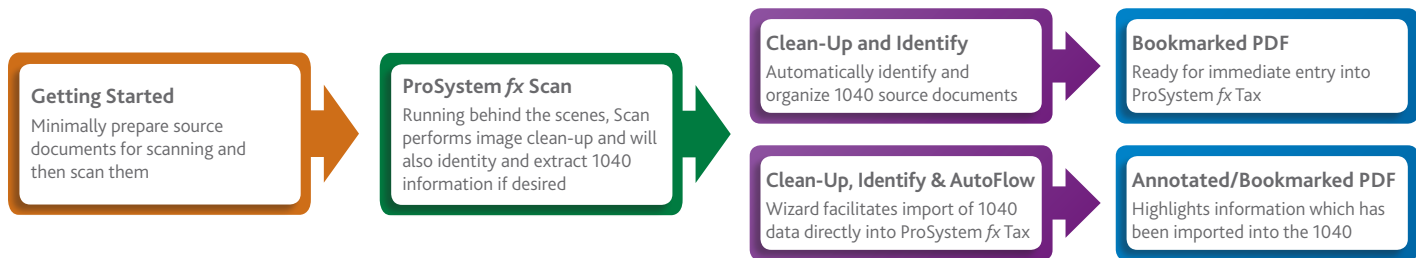
Using ProSystem fx Scan (SaaS) and AutoFlow is very straightforward. Here's how it works:

1. Following some minimal preparation, have your administrative or support staff scan your client's source documents.
2. Upload the source documents to ProSystem fx Scan (SaaS).
3. Scan will automatically identify and extract the information needed to prepare your client's paperless 1040 tax return.
4. Download the file when processing is complete.
5. Either prepare the 1040 manually or automatically import the data into ProSystem fx Tax using AutoFlow technology.
6. Use PDFlyer — our CPA-developed Adobe® Acrobat efficiency tool — to further improve your paperless preparation and digitize the review process. In addition to files processed with ProSystem fx Scan, PDFlyer will help you work more efficiently with any PDF file.

## Add PDFlyer™ for Even More Power

Designed to facilitate the tax preparation workflow process, PDFlyer is a powerful Acrobat® plug-in that lets you efficiently prepare 1040s using multiple PDF files in a paperless environment. It lets you:

- Simultaneously move pages when the associated bookmark is moved, whether that bookmark contains single or multiple pages.
- Merge multiple bookmarked PDF files into a single file, combining the contents of common bookmarks.
- Create and attach digital adding machine tapes.
- Utilize a set of CPA-specific tickmarks and hyper-linked connectors.
- **NEW!** Easily identify which source documents have been used in preparation or have already been reviewed with new sign-off tools.
- **NEW!** Tailor your digital 1040 workflows with new custom stamps.



*Coupled with ProSystem fx Tax, ProSystem fx Scan and PDFlyer™, AutoFlow Technology™ brings your firm the digital 1040 data import solution you've always imagined.*

## Add AutoFlow Technology for Even Bigger Time Savings

AutoFlow Technology takes the data extracted by ProSystem fx Scan and imports it directly into the ProSystem fx Tax return. With Scan and AutoFlow, you can:

- Extract data from common 1040 source documents.
- Facilitate verification of this extracted information.
- Import verified 1040 information directly into ProSystem fx Tax — in real-time.
- Extract detailed Gain and Loss statement information to a pre-configured spreadsheet for easy reconciliation and import.

In addition, our AutoFlow Wizard makes the validation and import process fast and easy. Validation steps maintain the accuracy of your data while your productivity skyrockets! AutoFlow Technology also integrates with ProSystem fx Tax (SaaS) and Global fx®, the web-based versions of ProSystem fx Tax.

## Leverage is the Key

During tax season, professional staff time is at a premium. Scan and AutoFlow leverage both advanced technologies and your firm's administrative support staff by:

- Creating an organized and bookmarked PDF file with minimal administrative support; Using ProSystem fx Scan, any firm employee can easily prepare and scan client source documents.
- Extracting 1040 information and importing directly into ProSystem fx Tax.

## CPA Developed, CPA Tested, CPA Proven

ProSystem fx Scan and AutoFlow will help empower your professional staff to do what they do best — adding value to client services.

- Make every client document instantly and simultaneously available to multiple users.

- Convert bulky, costly and vulnerable paper file storage to inexpensive, recoverable and secure electronic file storage.
- Increase staff productivity by pre-sorting client information and standardizing client files.
- Retain client data in the world's most common, accessible business document format — PDF.

## The Benefits of Paperless

- Shifting from paper documents to electronic ones lets your staff spend less time looking for the information they need and more time getting the job done. The files created by ProSystem fx Scan may be quickly and easily saved to ProSystem fx® Document or ProSystem fx Document (SaaS) — ready for instant retrieval.

One CCH firm in the Top 50 tested the effectiveness of ProSystem fx Scan, and here's what they found:

- For a 25-page source document, the firm realized 22 minutes savings on average, including approximately:
  - 15 minutes in preparer time.
  - Seven minutes in reviewer time.
- For a 100-page source document, the firm realized an average of 52 minutes in total time savings, including approximately:
  - 45 minutes in preparer time.
  - Seven minutes in reviewer time.

This firm found that their biggest time saver was having source documents that were organized and bookmarked.

For more information on ProSystem fx® Scan (SaaS) and AutoFlow call **800-PFX-9998** (800-739-9998) or visit **CCHGroup.com/ProSystemScan**

The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at [CCHGroup.com/ProSystemScan](http://CCHGroup.com/ProSystemScan). 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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