



# ProSystem fx® Portal — Consulting and Training

Focused consulting to meet your firm's  
needs and goals.

There is a broad range of topics that must be considered to maximize the value of ProSystem fx® Portal. Learn to work with Portal and meet the needs of your firm and your clients with consulting and training sessions conducted by experienced CCH consultants.

The training and consulting sessions are designed to allow your firm to realize the greatest possible return on its investment with ProSystem fx Portal. CCH consultants work with the firm administrators to identify the firm's needs and provide guidance with regard to configuration options and processes that will allow your firm to accomplish its goals for ProSystem fx Portal.

## Effective Roll-Out

Develop a comprehensive plan for a successful roll-out of ProSystem fx Portal from day one. Will all clients have access to ProSystem fx Portal, or will the clients need to meet specific criteria? Will you roll it out to all clients at once, or in phases? What will your firm communicate to clients about ProSystem fx Portal? Your CCH consultant can draw on a wealth of experience and best practices to assist your firm with these questions and more.

## Customized Set-Up to Meet Your Needs

CCH consultants will help you configure ProSystem fx Portal settings so that you can effectively and securely exchange files with clients:

- Ensure that clients can easily find files through the use of an effective folder structure.
- Provide firm users with security rights appropriate to their roles within the firm.
- Configure settings to govern which clients each firm user can and cannot access.
- Allow outside users to access specific client portals when appropriate and necessary.
- Identify who receives email alerts from the system, and customize the content of those emails.
- Manage these settings effectively so the firm can efficiently update them when necessary.
- Set up other ProSystem fx® products to integrate with ProSystem fx Portal.

## Go Beyond File Exchange

Learn how you can utilize the full scope of the possibilities offered by this cloud-based tool:

- Collaborate more effectively with clients by determining ways to use ProSystem fx Portal in order to increase the methods of client interaction with your firm.
- Underline your trusted advisor status and increase client retention by providing your clients with a potentially critical cloud-based infrastructure.
- Communicate valuable client messages securely, and drive traffic to your firm's website.
- Develop workflows and processes for using ProSystem fx Portal that are appropriate for how work is accomplished at your firm.

## Drive Efficiencies

Your CCH consultant can help your firm get started using ProSystem fx Portal immediately, without the unnecessary delays associated with training your clients to use the system. A practical folder structure that has been customized by the firm administrator and the CCH consultant can make it a breeze for clients to locate files.

Let your CCH consultant show you how to transmit final copies of deliverables to clients directly from ProSystem fx® Tax, Engagement and Document. The ability of CCH products to integrate seamlessly translates directly into increased efficiencies.

### Empower Your Staff

You can ensure that the appropriate files are easily accessible to the staff who will be working with them — or restrict access to certain files, as needed. You can also configure the system so that staff members who need to collaborate have access to needed files. Your CCH consultant can work with you to create groups of users with segregated access to files and differentiated functional rights, so that each staff member can accomplish all tasks the new workflow requires of them.

Providing your staff with the specific ProSystem fx Portal training they need will maximize the system’s impact and increase your firm’s efficiency.

### ProSystem fx Portal Consulting and Training Services

Course	Description	Who Should Attend
<b>Administrator Training</b>	The CCH consultant demonstrates the system’s set-up and configuration options. A folder template is configured and applied to a sample client’s portal. A firm user is created, granted — or denied — access to the sample client, and given some abilities while being denied others. Client-side users are set up and given access to one or more portals. Licensing and storage details are addressed, as is integration with other products.	<b>Firm Administrator(s)</b>
<b>Best Practices Consulting</b>	The firm’s goals for ProSystem fx Portal are explored, best practices are discussed and corresponding decisions are made. The firm’s own ProSystem fx Portal account is used for this session and many of the necessary action items are completed.	<b>Firm Administrator(s)</b>
<b>End User Training</b>	The CCH consultant will demonstrate ProSystem fx Portal’s end-user functionality: logging into the system, adding files, searching for files, and working with files.	<b>All Staff</b>

For more information on CCH Consulting Services call 800-PFX-9998 (800-739-9998) or visit [CCHGroup.com/Training](http://CCHGroup.com/Training) for a detailed list of training and consulting course opportunities.

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