



The Benefits of a Common Client Database



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In the next generation of the ProSystem *fx* Suite of products, CCH delivers the profession's first centralized common client database. The common client database creates a single location to store client information across all ProSystem *fx* applications. This whitepaper examines how a common client database can help firms:

- Simplify and centralize updates to client information
- Improve quality of client service
- Reduce errors
- Increase efficiency and focus on higher-value work

For years, the accounting profession has been abuzz with the promise of what has amounted to accounting's holy grail: a centralized common client database across multiple applications. It's no secret that maintaining current and accurate client data is a difficult and time consuming task, sapping the efficiency of preparers and IT staff alike. With the average accounting firm using a multitude of different software programs — each with its own separate database — it's not difficult to see why the promise of a common client database has gained almost mythical status.

Until recently, creating a common client database was out of reach for most firms due to technology limitations, the complexity and sheer number of their software solutions, and cost. Today, technology advances now make the promise of a common client database a tangible reality.

CCH is proud to be the first provider to deliver a common client database to market with its next generation of the ProSystem *fx* Suite of products, and to make it available to both on-premise and Software-as-a-Service (SaaS) clients. As a thought and technology leader in the accounting profession, we are continuously leveraging the latest technologies to improve CCH products and services and make our clients' lives easier. To that end, with our next generation of products, we are in the process of migrating to a centralized Microsoft .NET framework, moving toward SaaS and Smart Client technologies and creating solutions within an open architecture that will tighten integration across solutions and deliver a common client database along with a host of benefits to end-users.

The purpose of this whitepaper is to share CCH's vision for the future and to provide an overview of the benefits achieved through the creation of a common client database.

Improved Accuracy and Efficiency Through Automatic Content Flow

One of the greatest benefits of a common client database is the ability to have client content information automatically flow to the appropriate locations throughout the software. Historically, legacy products tended to share data inefficiently. Contact databases didn't "communicate" with Customer Relationship Management (CRM) systems or e-mail systems. Practice management applications didn't share data efficiently with tax programs, etc. As a result, client names, social security numbers and basic information had to be re-entered each time the software called for them, wasting valuable time and efficiency. Maintaining accuracy was also a challenge with multiple entries.

With a common client database, the preparer only needs to key information once, and the program automatically flows content to the appropriate locations, saving time and ensuring that the information is current and correct. For IT staff and those charged with maintaining data integrity, this advancement means updating one database vs. updating each application individually.

Tighter Integration for Shared Efficiency and Easy Set Up

CCH is committed to tightening the integration of our product line across the entire ProSystem *fx* Suite of products, starting with Tax, Practice, Document and Workstream, and eventually spreading to all CCH products. The common client database is central to this strategy. As a result, content flows to all open CCH applications, so that preparers using ProSystem *fx* Tax do not have to re-enter client information in ProSystem *fx* Document or ProSystem *fx* Practice.

As a result of tighter integration, new products will take much less time to set up. When a firm adds additional CCH ProSystem *fx* products, they all will share the same common client database, as well as the same look and feel. If users change a client's address in one application of the Suite, they have the option of pushing those changes to the common client database, eliminating the need to make the same change in other applications and ensuring consistency and accuracy.

Third Party Integration Reduces Time Maintaining Client Information

In creating a common client database, CCH is committed to working within an open architecture, making it easy for third party applications that have a common need for client information to integrate with the centralized database. For example, CCH's Third Party Integration program (3P1) will allow firms that use a payroll system (on premise or SaaS) to connect that system's database to the common client database.

In addition, we recognize the value of the data stored within CCH software applications, and are taking steps to make the valuable data captured within CCH products available for export to other programs (such as Microsoft Excel) or to another software vendor.

Single Sign-On for Easy Access and Smooth Workflow

One of the added benefits of tighter integration is the ability to offer users a single sign-on. Instead of having to log into each CCH application individually, staff can have one login ID and password that admits them to all appropriate applications across the suite.

For example, a preparer logged into ProSystem *fx* Tax and wanting to link into IntelliConnect™ to conduct research will be able to seamlessly pass through without having to enter another set of credentials. This single sign-on capability will save time and improve overall efficiency.

Centralized Credentialing for Easy Set Up and Security Management

With this new release, CCH has fully integrated with Microsoft Active Directory, which allows a firm to use Active Directory as a single point of reference in the credentialing process. As a result, IT staff only needs to set staff up one time within the system and CCH will pull the credentials directly from Active Directory.

With Active Directory integration, IT professionals can set up a new staff person (or groups of people) and assign the person to an existing security profile template, depending on the type of staff and the type of work that they will be doing. This represents a huge increase in efficiency, enabling IT to get new staff up and running in just a fraction of the time than if they had to set up each new staff member in each program individually.

Simultaneous Multi-User Access for Improved Collaboration and Efficiency

Finally, another significant benefit of having a common client database is the ability to offer simultaneous multi-user access on the same return. Coming soon, multiple preparers will be able to work on a multiple state corporate return at the same time. For example, one preparer will be able to prepare the Oklahoma state return while another completes the New York state return at the same time. CCH is committed to facilitating collaboration by enabling client data to be pushed to more than one section simultaneously.

The Reality of a Common Client Database Starts Now

In conclusion, CCH's next generation of the ProSystem *fx* Suite of products takes the promise of a common client database and makes it fully formed reality. This advancement signals a new era for the accounting profession, bringing to fruition the promise of centralized data and a unified framework. Companies that implement a common client database will have the ability to:

- Simplify and centralize updates to client information
- Improve quality of client service
- Reduce errors
- Increase efficiency and focus on higher-value work

For more information about CCH's newest generation of the ProSystem fx Suite of products and how your firm can benefit from a common client database, contact a CCH account representative at **1-800-739-9998**.



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