



ProSystem fx® Document – Client Portal

Reliable, secure access to confidential documents.

Support your clients' privacy with Client Portal for ProSystem fx® Document, and eliminate the practice of sending confidential information via email.

A number of states have already passed laws prohibiting firms from sending confidential information via unencrypted email, and more are expected to follow. Rather than implement complicated data encryption processes, your firm can utilize a safe, secure portal to comply with these laws.

The Client Portal's bi-directional file exchange capabilities make it easy for you to securely deliver and receive client documents, facilitating collaboration and supporting the upload of even the largest files.

IMPROVED CLIENT SERVICE

With the Client Portal and ProSystem fx Document, your clients will experience unmatched convenience through instant access to their documents — including tax returns, financial statements and source documents. Meanwhile, your firm will benefit from reduced overhead and greater efficiency.

With banks, financial planners, and insurance agents offering similar services, now is the time to secure your firm's position as a leading service provider. As a trusted advisor, your firm should be your clients' first choice for storing sensitive and personal documents online.

Client Portal helps you and your clients:

- Access vital documents immediately from any location with Internet access via a secure, private repository.
- Organize documents electronically in cabinets and folders that mirror the way you store paper documents.
- Easily upload documents of all sizes without relying on an FTP server.
- Designate files as Read Only or Read/Write for easier access and greater security.
- Check out documents to prevent other users from editing while they are being updated.
- Maintain previous file versions in the document history.
- Search, filter, and display documents by file type, title, creator, key word and more.



The Client Portal's bi-directional file exchange capabilities make it easy for you to securely deliver and receive client documents.



THE POWER OF AN INTEGRATED WORKFLOW

Make your engagements more efficient by opening a simple communication channel between you and your clients.

ProSystem fx Document features tight integration with ProSystem fx Tax, Engagement, Scan, and other CCH solutions to provide a central repository for all files and records your firm chooses to retain.

Your firm's knowledge base can be leveraged through integration with IntelliConnect™, CCH@Hand™ and Accounting Research Manager®, facilitating searchable storage of commonly researched topics in ProSystem fx Document.

These integration points support your workflow processes, from back office through customer service.

EXPAND COMMUNICATION

With Client Portal, you can share PDF files, Web pages, hyperlinks, Microsoft® Excel spreadsheets, Microsoft® Visio diagrams, Microsoft® Word documents, PowerPoint® presentations, and financial software data files, among others.

For example, your clients can now upload their QuickBooks® files to the Client Portal, eliminating the need to exchange DVDs.

One Top 100 CPA firm took its tax practice 100% paperless, and processed more than 3,000 tax returns annually using ProSystem fx Document and Client Portal.

COLLABORATION MADE SIMPLE

With Client Portal, phone-tag and missed meetings are a thing of the past. This instant access lets your clients view their documents with minimal effort on the part of your firm.

- **Tax Returns** – With Client Portal, a single mouse click makes an entire tax return available for the client's review. After reviewing the return, your client simply signs the *e-filing* release and faxes it to you. The return is now ready for electronic filing.
- **Financial Records** – Clients often need the prior two years' tax returns to secure bank loans or for legal purposes. Simply publish the tax returns and source documents to the Client Portal, and your client can securely access them at any time.

SECURE ADDITIONAL REVENUE FOR YOUR FIRM

Add value to your client services by offering your clients an electronic space to store all of their personal documents. By using the Client Portal as a convenient electronic storage room, you'll enhance your communication while creating a potential revenue stream for your firm. You can charge a minimal monthly fee for this valuable service and watch your revenue grow.

For more information on ProSystem fx® Document – Client Portal call 1-800-PFX-9998 (1-800-739-9998) or visit CCHGroup.com

The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at CCHGroup.com/Document. If you plan to use multiple ProSystem fx Suite products within the same system, call 1-800-PFX-9998 (1-800-739-9998) 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.



CCH

a Wolters Kluwer business

1-800-PFX-9998 (1-800-739-9998)
CCHGroup.com