



## ProSystem fx® Document ASP

Spend less time on IT and more time on client service when CCH hosts your firm's documents.

Whether you are a small single-office firm, an international multi-office firm, or any size in between, CCH has the document management solution that will help your firm become a digital office.

Because it is hosted, ProSystem fx Document ASP provides many benefits: it is quickly and easily implemented, provides a secure backup of all your files that assures business continuity in the event of a disaster, and lets your staff enjoy 24/7 remote access to the information they need.

### EMAIL MANAGEMENT

In addition to storing your workpapers, data files, and back-office documentation, ProSystem fx Document ASP also helps you better manage your email by allowing you to:

- Drag and drop emails directly to your ProSystem fx Document client list from within Microsoft® Outlook.
- Search for files stored in ProSystem fx Document from within Microsoft® Outlook.
- Drag-and-drop files directly from ProSystem fx Document into emails as attachments.
- Enhance collaboration within the firm by making select client emails accessible to everyone working with that client's return.
- Comply better than ever before with regulations related to email retention and destruction.
- More efficiently manage the size of your exchange servers by storing emails in a secure location.
- Eliminate risks related to hard drive crashes or laptop thefts by storing emails outside of archived email storage.

### VERSATILE SEARCH CAPABILITIES

It's one thing to have all your firm's documents stored in one place. It's another to be able to find them!

With ProSystem fx Document ASP, search criteria for documents, clients, and word searches are combined on one screen. This lets you effortlessly perform the searches necessary to quickly find the right document. For your convenience, Document ASP even offers plug-ins that allow you to perform searches, access, and display information from other ProSystem fx applications.

### REDEFINING DOCUMENT MANAGEMENT

With a quick start-up time and state-of-the-art technology, ProSystem fx Document ASP provides secure 24/7 transfer, access, and storage to your firm's documents.

Keeping track of your documents is effortless with an easy-to-use home page. Use it as a dashboard to reflect your individual preferences and job requirements. For example, your home page can include recently accessed documents, tax returns, engagement binders, full search capabilities, and more, putting you one click away from everything you need.

With ProSystem fx Document ASP, you can also facilitate your firm's compliance with Sarbanes-Oxley and other regulations. Manage retention periods so you'll know when documents expire.

Document ASP also supports audit trails and versioning – automatically.

### SECURE REMOTE ACCESS

Put risk management concerns behind you with ProSystem fx Document ASP.

All of your firm's data will be stored on a Tier IV, fault-tolerant infrastructure site to ensure the highest level of security both internally and externally. The data center includes features such as redundant capacity systems and dual powered equipment to ensure the safest possible environment. And, with instant and simultaneous access, multiple users can view a document at the same time.

## CLIENT ACCESS

ProSystem fx Document ASP also boosts your client service options by giving clients immediate access to their documents through the optional Client Portal.

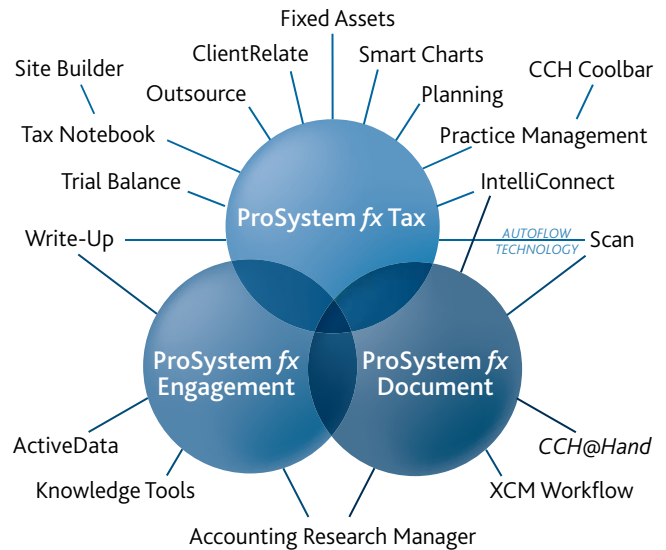
By giving clients secure and easy access, you'll increase both your efficiency and your client's satisfaction by putting documents at their fingertips. This increased level of service can give you a competitive edge and enhance your reputation as a trusted partner. By implementing a usage fee, Client Portal can even provide an additional revenue option for your firm.

## INTEGRATION OPTIONS

ProSystem fx Document ASP delivers integration options that help minimize duplicated information and increase your firm's efficiency. Effortless integration with Microsoft® Office and other industry-specific applications helps Document ASP fit right into your existing workflow, simplifying your firm's transition to an increasingly paperless office.

Experience unprecedented efficiency in your tax return preparation process with integration options such as:

- Integration with ProSystem fx Scan that lets you save bookmarked source document PDFs to ProSystem fx Document ASP in one easy step.
- Automatic routing of ProSystem fx Tax returns to Document ASP. Global fx users can manage tax returns from any location with Internet access, simplifying the tax return process for anyone working remotely.
- The ability to launch a ProSystem fx Engagement binder directly from your ProSystem fx Document ASP home page .
- Centralized and simplified research by launching Accounting Research Manager® from ProSystem fx Document ASP.



Increase productivity through CCH integration that lets you share data between applications so you can quickly access the information you need.

## EXPLORER-STYLE FUNCTIONALITY

Simplify your day-to-day work with a secure Windows® Explorer-style interface that provides unmatched versatility and ease-of-use. Simply navigate within ProSystem fx Document ASP just as you would in Windows® Explorer. From there, it is easy to drag-and-drop files into or out of Document ASP.

## FIRM-HOSTED OPTION

If you are looking instead for a firm-hosted solution, ProSystem fx Document has been recognized for the past five consecutive years on *Accounting Today's* prestigious Top 100 Products list, and provides award-winning content management functionality and performance.

For more information on ProSystem fx® Document ASP call 1-800-PFX-9998 (1-800-739-9998) or visit [CCHGroup.com](http://CCHGroup.com)

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

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