



## ProSystem fx® Document

Instant access to firm documents —  
anytime, anywhere.

The next generation of ProSystem fx Document, available as a SaaS solution initially and on-premise in 2010, is a full-featured document management system which provides a secure, scalable, easy, and efficient way for your firm to store, search for, and use documents while facilitating paperless workflows. The next generation of ProSystem fx Document is not a rehashed on-premise application retrofitted to operate in the cloud; it was specifically designed from the ground up to take optimal advantage of an online environment so you can work smarter and more efficiently.

Available either stand-alone or coupled with the feature-rich ProSystem fx Suite, the next generation of Document delivers robust functionality via a dynamic, centralized, hosted platform. Running on powerful smart client software, Document is quickly deployed and automatically updated, instantly saving you valuable time.

### Provide Better Client Service

Providing prompt client service is critical to your firm's continued success, and having client information accessible will elevate your client service to the highest level.

With ProSystem fx Document, you'll benefit from:

- **Accurately filed documents:** With the fast and intuitive Outlook-like search feature, locating a file has never been easier and more efficient. No more frustrations from misfiled paper or digital files and no more playing phone tag with clients.
- **Round-the-clock access:** ProSystem fx Document provides 24/7 access to firm documents, expanding your office to any location with an Internet connection.

When coupled with the rest of the ProSystem fx Suite, your complete virtual office is only a mouse click away.

### Designed for Increased Efficiency

ProSystem fx Document provides you with the tools needed to help your firm achieve the maximum level of efficiency and productivity. Because all files are centrally located in one organized digital repository, significant time will be saved searching for files previously stored in multiple locations.

Greater efficiency is possible through:

- Convenient integration with the next generation ProSystem fx Suite products: ProSystem fx Tax, Practice, Workstream and Portal, as well as Microsoft Office.
- Elimination of duplicate data entry by utilizing the common client database and administration manager, which automatically updates information across the entire Suite so you only have to enter it once.
- Instant access to stored documents so you always have what you need, when you need it.

### Minimize IT Overhead Costs

Because the next generation of ProSystem fx Document resides on CCH servers in our secure Class 4 data center, your firm will not need to invest in additional hardware or IT resources. In addition to lower up-front costs, solutions residing in the cloud are less costly to maintain due to the accelerated delivery of updates and enhancements and greater scalability to meet changing business needs.

Because all files are centrally located in one organized digital repository, significant time will be saved searching for files previously stored in multiple locations.

## Protect Your Firm's Most Valuable Asset

Ensuring the confidentiality of your client data is the highest priority, both for your firm and for CCH. With ProSystem fx Document, you can rest assured that your sensitive files are securely protected. Document accomplishes this through:

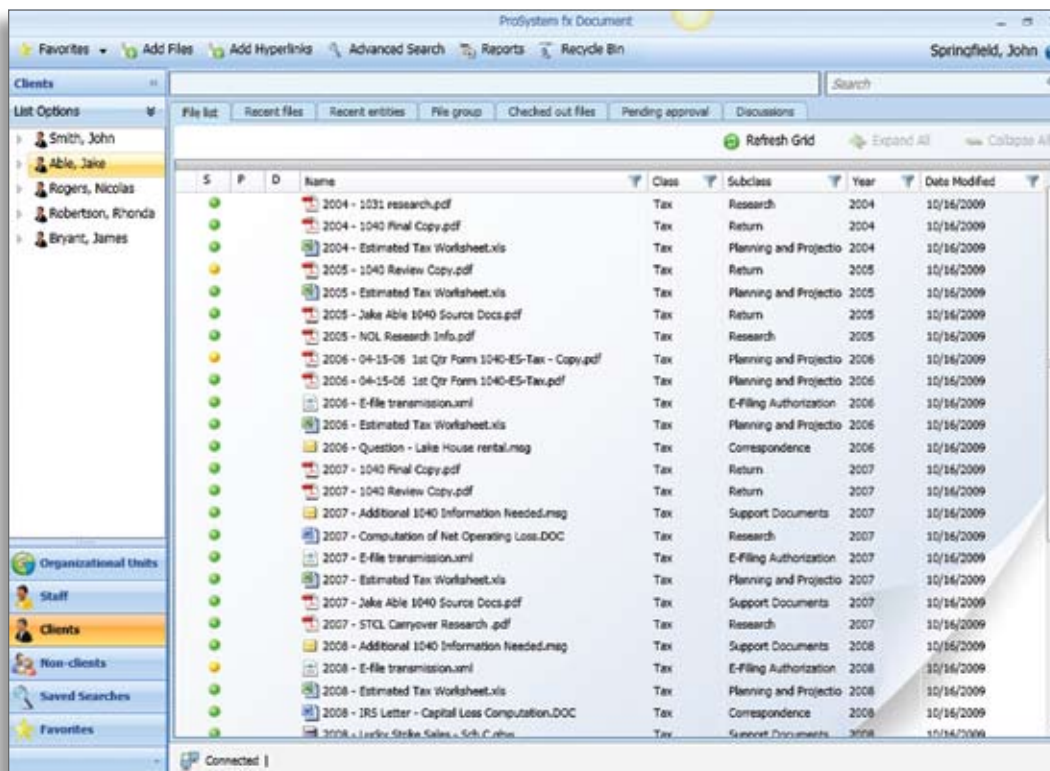
- **Password-protected access:** Document utilizes 256-bit, Secure Socket Layer (SSL) encryption with password protected access. Since documents are hosted at the Business Logic Layer, users can only log in with a unique username and password.
- **Encrypted information:** Files are encrypted before being passed over the Internet and while being stored within Document.
- **Automatic virus scan:** For added protection, files are automatically scanned for viruses before being uploaded. All files are maintained behind secure firewalls to protect against outside intruders.

## Tight integration Yields Improved Workflows

The next generation of ProSystem fx Document tightly integrates with the next generation ProSystem fx Suite, including ProSystem fx Tax, Practice, Workstream and Portal. This integration allows you to take full advantage of the ProSystem fx Suite common client database and administration manager, providing time savings via single login capability, eliminating errors by ensuring consistency of common information across the Suite, and significantly reducing duplicated efforts. And since the entire ProSystem fx Suite was designed with integration in mind, consistent user interfaces and the customizable Suite dashboard make navigation a breeze.

## Delivering an Optimal Solution

In the end, it is all about finding solutions that work. As a centralized location for storing, accessing and managing all your firm's documents, the next generation of ProSystem fx Document is the piece that brings your paperless office together. Contact your CCH sales representative today to learn more.



Improve client service and operational efficiency by having the right information at your fingertips.

For more information on ProSystem fx Document, 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/ProSystem](http://CCHGroup.com/ProSystem). 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

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