ENHANCED USABILITY STREAMLINES THE WAY YOU WORK

Now you can customize your Document home page to specifically support the way you work every day. The home page allows you to configure a display of 1 to 6 panels, select a layout template for organization, and even choose to make the Search page your home page. All panels are in the left navigation bar so everything is readily available, and can also be shown in full-screen views. And many functions, including lock, check out, check in, version numbering, direct editing, discussion, and overdue notification, are now readily accessible to improve overall usability and help you organize, manage, and maintain your documents.

CLIENT PORTAL OFFERS ACCESS FROM ANYWHERE

ProSystem fx Document not only enhances the workflow within your firm, it also enhances communication with your clients. Convenient Client and Document Discussion features allow the entire firm to communicate about specific documents or clients. Add Client Portal and you have a reliable, secure resource in which you and your clients can exchange information.

Additional integration with Microsoft® Outlook expands communication and control even further. The increased collaboration with clients and staff, whether in the office or working remotely, means your firm can now offer your clients enhanced services. All documents published to the Client Portal allow easy retrieval by anyone who has access. Store documents in cabinets and folders that have customizable names to allow the storage to mimic the way you currently file your paper documents.

Improved disk space management and hardware requirements make Client Portal more affordable than ever before, while increasing security and efficiencies in your work processes at the same time. Documents are available upon logging into Client Portal, and can be designated as read or read/write for easier access and greater security. Experience enhanced document management with Client Portal through preserved history and maintained synchronization.

ESSENTIAL COLLABORATION TOOLS IN TODAY'S WORKPLACE

Everyone working on an engagement should be able to collaborate, whether working remotely or in the office. ProSystem fx Document's tight integration with ProSystem fx® Tax, Engagement, Scan and other modules in The ProSystem fx® Office suite make it a firm-wide solution – for documents created within the ProSystem fx Office suite or elsewhere. Provide the foundation for your firm's knowledge library by adding integration with CCH@Hand and CCH's Accounting Research Manager and your firm will manage electronic research documents more intelligently than ever.

The integration between ProSystem fx Office, CCH research tools and Microsoft Office allow you to create a complete paperless environment. This unmatched integration offers support for all workflow processes in the firm, including tax returns, any type of engagement, and back office processes such as Human Resources, in addition to collaboration between you and your clients.

CCH HELPS YOU ACHIEVE A PAPERLESS WORKFLOW

CCH, a Wolters Kluwer business, even offers a full range of services to make your switch to a paperless environment as smooth and productive as possible. These services include installation, firm-wide consulting on best practices and training. Our consultants conduct a personal survey to determine if there is anything needed to make your firm ready to implement ProSystem fx Document.

Reduce the costs associated with creating and storing paper documents, and achieve the dramatic improvements in workflow and client benefits that this technology has to offer. It is a smart business decision that will make your firm more profitable. Let us help you achieve this dream.

For more information, and to place orders, call us today at 1-800-PFX-9998!

SYSTEM REQUIREMENTS

- Dedicated Microsoft Windows 2003 server
- Windows 2000 or 2003 active directory domain
- Dual 2.4+ GHz Intel Pentium processor or equivalent
- 1GB - 3GB 200MHz DDR SDRAM
- 40+ GB hard drive
- Breakdown of drive -
  - c:/ - system = 10GB
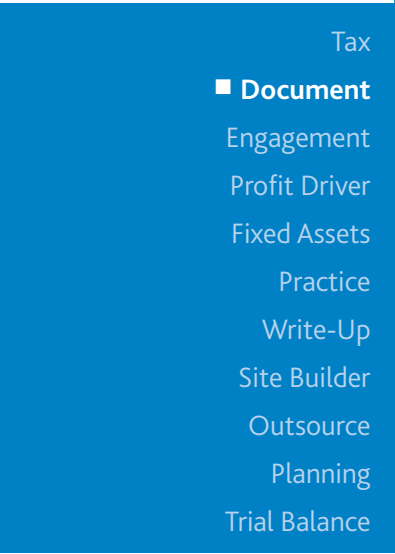 - d:/ - log files = 10GB
  - e:/ - SQL DB = 15GB

Note: Indexed data = 20% of your projected client storage usage for storing indexed data

- .NET framework installed and configured
- Microsoft Internet Information Server 6
- SQL Server 2000 standard or enterprise edition
- SMTP-enabled e-mail (SMTP mail server preferred)

Note: The number of prospective concurrent users & available bandwidth should determine the specification for the server(s).

RECOMMENDED CLIENT (DESKTOPS/LAPTOPS)

- Microsoft Windows 2000 Professional (minimum SP2), Microsoft XP Professional or higher operating system
- Internet Explorer 6
- Microsoft Office 2000 or higher (minimum SP2)

CCH
a Wolters Kluwer business
21250 Hawthorne Blvd.
Torrence, CA 90503
1-800-PFX-9998
CCHGroup.com

CCH
a Wolters Kluwer business

Reduce the costs associated with creating and storing paper documents, and achieve dramatic workflow improvements with ProSystem fx® Document.

Tax
■ **Document**
Engagement
Profit Driver
Fixed Assets
Practice
Write-Up
Site Builder
Outsource
Planning
Trial Balance

ProSystem fx Document

The only tool your firm needs to enjoy the benefits of a paperless workflow.

ProSystem fx Document brings your firm:

- Streamlined workflows that result in improved productivity
- More time for staff to generate revenue from new clients and to provide additional services to existing clients
- Freedom from dependence on physical pieces of paper, because Document allows access to any document from any location
- Automated document retention, allowing you to implement a consistent firm-wide retention policy

The paperless office clearly remains a hot topic in today's public accounting firm, appearing on the AICPA's Top 10 Technologies survey for several years running. The benefits of electronic storage are many, including administrative cost savings; the security of having a computer backup of all your client files which, properly stored, is free from the perils of fire or water damage; and 24/7 remote access to the heart of your business: your client files.

But what does it really mean to take your firm from a world of paper to one without? The definition of paperless varies from firm to firm. In a truly digital environment, more than just your audit and tax returns are in electronic format – your firm's entire workflow is paperless.

ProSystem fx Document manages the full range of documents found in an accounting practice – from tax returns to client correspondence, to employee records and e-mail – reducing the costs associated with creating and storing paper documents and resulting in an environment where employees work together more efficiently. Deliver better service to your clients by eliminating wasted time hunting down pieces of paper.

Besides the increased efficiencies and cost savings, ProSystem fx Document will also provide you with the risk mitigation you need for document storage and retention. Sarbanes-Oxley and other regulatory compliance rules have changed the way you do business. ProSystem fx Document helps you meet those new standards, all in the background of your day-to-day work.

EXPERIENCE THE POWER OF AN ELECTRONIC WORKFLOW

The content required to prepare individual tax returns can be complex. With CCH products engineered to facilitate a paperless workflow, you'll experience unprecedented efficiency in managing all the pieces of the returns preparation process, from source documentation to time management, client relations, project management, and document retention.

■ Integration between ProSystem *fx®* Practice Management and ProSystem *fx* Tax means you can automatically create and manage client information from one location.

■ Scan, organize, and bookmark source documents with ProSystem *fx®* Scan, and then save directly to Document in one step.

■ Manage ProSystem *fx®* Fixed Assets files with Document, apply metadata to these files, and allow for association to clients and tax projects.

■ Import data from ProSystem *fx* Fixed Assets and related research from CCH@Hand™ for readily available preparation and review.

■ Manage additional file types, such as Quickbooks, that are used for Schedule C businesses. Information is always available and you can control the numerous files your clients send you. Unnecessary files will never again sit on your network consuming valuable space.

■ With CCH®ClientRelate™, stay on top of new tax developments and immediately identify affected clients, as well as target clients that may benefit from additional services.

■ Electronically file returns and eliminate the abundance of paper that must be organized, filed, and retrieved.

■ Offer clients immediate access to their return via the Client Portal, and an invoice prepared from time and billing entries that is tracked in ProSystem *fx* Practice Management.

■ Store returns in Document with the appropriate retention periods for automatic destruction upon expiration.

The requirements for filing business tax returns are also expanding, from electronic filing requirements for federal returns to the expanded state capabilities. With the same CCH products used for individual returns, along with the award-winning and industry-leading ProSystem *fx®* Engagement, the process is easier than ever before.
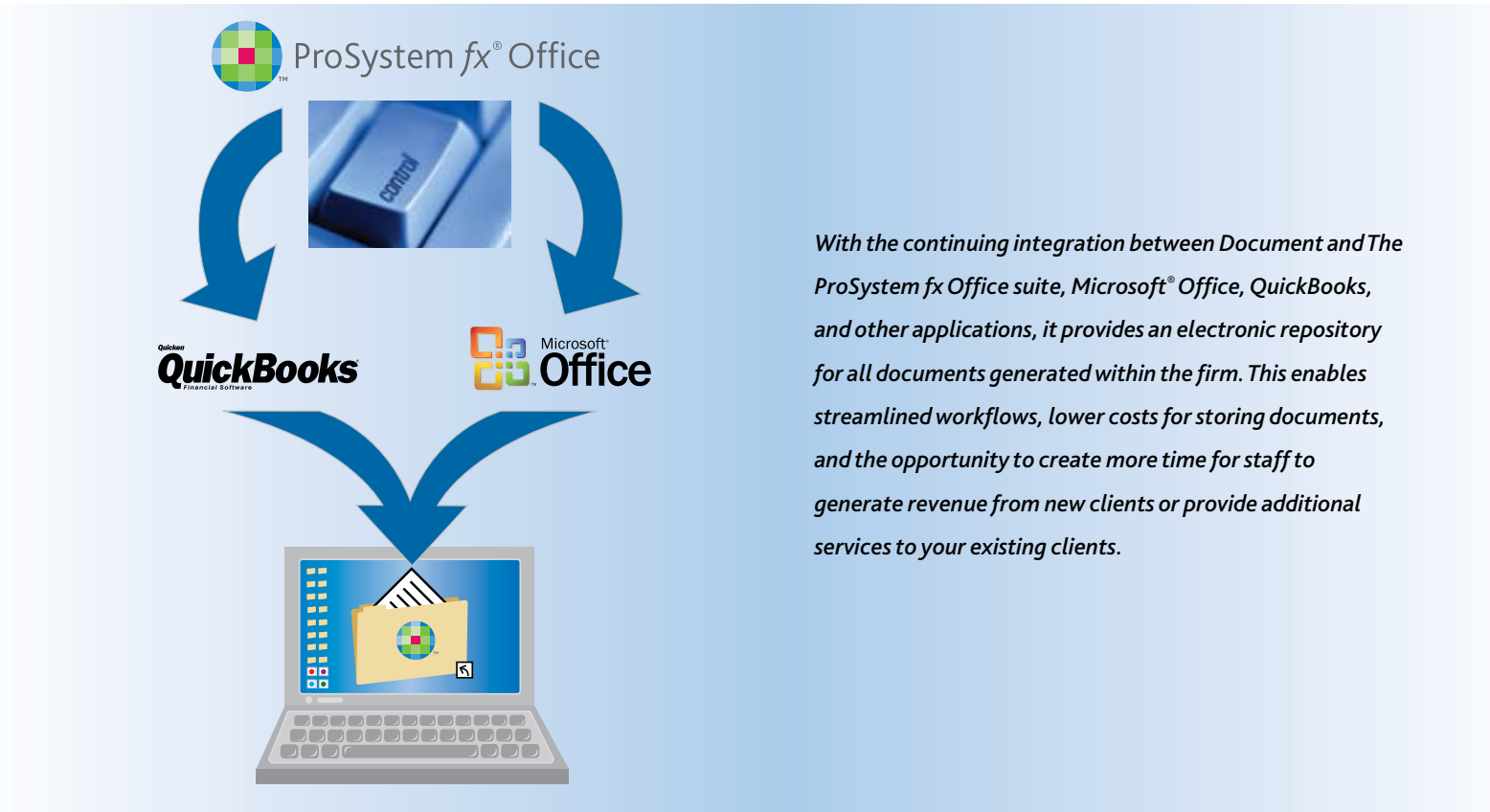
■ Manage client information, along with the time and billing, through ProSystem *fx* Practice Management.

■ Prepare necessary Excel and Word financial statements efficiently with ProSystem *fx* Engagement.

■ Provide a direct import to ProSystem *fx* Tax, via Dynalink and Quiklink functions that map the data, offering the ability to drill directly back to the source information in the Engagement trial balance.

■ Store permanent files and correspondence in either Document or Engagement, eliminating the need to file paper documents.

■ Utilize CCH@Hand and Accounting Research Manager to support all decisions.

■ File and store final returns in an Engagement binder, and easily send returns to clients via the Client Portal.
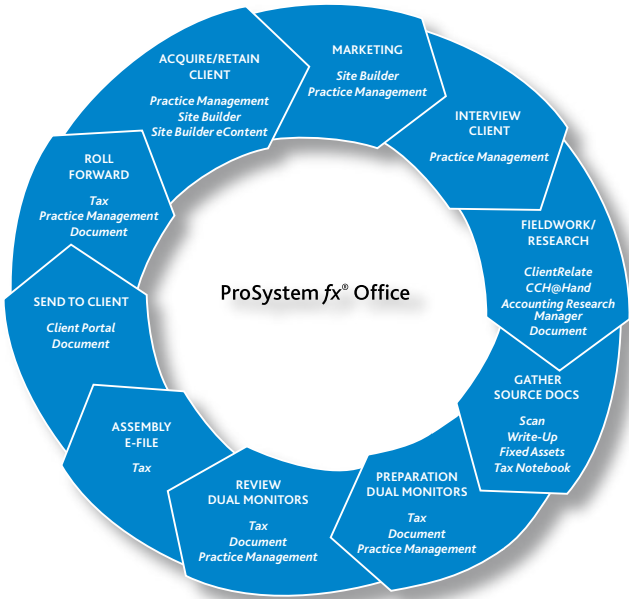
Workflow Wheel

From acquiring new clients to gathering source documents and generating the tax return, ProSystem fx Office offers a multitude of paperless solutions that keep returns moving through your firm.

(Workflow wheel diagram: ProSystem *fx®* Office at center, with segments — MARKETING: Site Builder, Practice Management; INTERVIEW CLIENT: Practice Management; FIELDWORK/RESEARCH: ClientRelate, CCH@Hand, Accounting Research Manager, Document; GATHER SOURCE DOCS: Scan, Write-Up, Fixed Assets, Tax Notebook; PREPARATION DUAL MONITORS: Tax, Document, Practice Management; REVIEW DUAL MONITORS: Tax, Document, Practice Management; ASSEMBLY E-FILE: Tax; SEND TO CLIENT: Client Portal, Document; ROLL FORWARD: Tax, Practice Management, Document; ACQUIRE/RETAIN CLIENT: Practice Management, Site Builder, Site Builder eContent)

COMPREHENSIVE INTEGRATION BRINGS EVEN MORE VERSATILITY.

(Diagram: ProSystem *fx®* Office with QuickBooks and Microsoft Office connected to a laptop)

With the continuing integration between Document and The ProSystem fx Office suite, Microsoft® Office, QuickBooks, and other applications, it provides an electronic repository for all documents generated within the firm. This enables streamlined workflows, lower costs for storing documents, and the opportunity to create more time for staff to generate revenue from new clients or provide additional services to your existing clients.

MAXIMIZE YOUR ENGAGEMENTS FROM START TO FINISH

With ProSystem *fx* Engagement as the centerpiece of any engagement performed in your firm, you're already experiencing the benefits of a smooth electronic workflow. However, integration with applications such as ProSystem *fx* Document, ProSystem *fx* Scan, Prosystem *fx* Practice Management, and Accounting Research Manager, plus the related controls of time, clients, projects and associated documents, round out the remainder of the engagement.

■ Manage all aspects of an audit through seamless integration with Accounting Research Manager and CCH's accounting and audit titles.

■ Eliminate the need to search for workpapers in an accordion binder. Information flows throughout the entire electronic binder; source documents can be efficiently scanned in and logically stored for easy retrieval; workpaper notes can be created and answered within the application; signoffs can be obtained efficiently; and there are no constraints to where the work is done.

■ Store permanent files and correspondence in ProSystem *fx* Document.

■ Prepare final tax returns from final financial statements.

■ Send financial statements to clients via the Client Portal, eliminating the dependency on paper and increasing firm efficiencies.

"The CCH suite of products has really changed our perspective on document management. With the ease of implementation and the benefits it provides, no one should hesitate to go paperless."

— Craig Erickson, Wiss & Company, LLP

IMMEDIATE EFFICIENCY WITH EXPLORER-STYLE FUNCTIONALITY

Windows Explorer-style functionality in Document brings you unmatched versatility and ease-of-use. While still incorporating the security features inherent in ProSystem *fx* Document, the Document Drive offers an effortless learning curve and increased user efficiency.

■ Simply drag-and-drop or paste files into Document, while simultaneously storing related metadata.

■ End users easily navigate to the files they need.

■ You define all authenticated user access permissions.

■ Extend your office by providing an efficient resource for your staff to work while traveling. Newly created documents added to the Document Drive or checked in after working off-line will automatically be validated and uploaded the next time you sign into ProSystem *fx* Document.

■ Streamline other day-to-day features with the Document Drive, such as checking out and checking in multiple documents.

VERSATILE SEARCH CAPABILITIES VIEWED AT A GLANCE

Search parameters for documents, clients, and word searches are combined on one screen with ProSystem *fx* Document, so you can perform searches using any combination of these parameters, based on the customized search criteria you have made available. In addition, multiple offices can conduct searches on any combination of offices from the same screen. We even offer plug-ins that allow you to perform searches, then access and display information, from other ProSystem *fx* applications – all directly from your Document Home Page.

REDEFINING DOCUMENT MANAGEMENT

The new and unique Extended Storage feature provides you never-before-seen functionality in document management, reinventing the way you manage not only documents, but also other applications.

■ Extended Storage expands your document management system into a content management system. Now you can manage applications like ProSystem *fx* Fixed Assets and QuickBooks without concern of broken links due to versioning issues – a unique feature of ProSystem *fx* Document.

■ The metadata is associated to the application files, allowing you to track history, use retention periods, apply classes and subclasses, and include them in your search results. Now you can associate these applications with clients and the numerous projects you do throughout your firm. You do nothing more than tell ProSystem *fx* Document to store the files in Extended Storage – no additional management is necessary.