CCH, a Wolters Kluwer Business – ProSystem *fx* Document

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Strengths:

- Integration with suite of ProSystem *fx* applications
- True web based SaaS model for scalability and simplified deployment and upgrade maintenance
- Maturity of ProSystem *fx* Scan with PDFlyer application to streamline 1040 document organization and document annotation
- Common client database eliminates redundant client setup across all applications (SaaS model only)
- Single sign-on to all ProSystem *fx* SaaS applications

Potential Limitations:

- If you do not use other ProSystem *fx* applications the value is minimized due to lack of integration
- You will need to think through your strategy in regards to the on-premise vs. SaaS model

Best Firm Fit:

The integration with the entire suite of ProSystem *fx* applications makes Document a compelling option for any firms that are using one or more of these applications. The more you are using, the better the fit. The SaaS model offers a good option for firms that want to minimize the technology issues they have to deal with and it is pretty clear that this the direction that CCH is focusing their future product strategy on.

Some of the more notable features of ProSystem *fx* Document include:

- Configurable Dashboard that includes direct integration with Outlook, direct access to documents and task assignments.
- Direct access to a list of recently accessed documents and files pending approval for publishing to the portal.
- The Assignment tab provides a list of client projects currently assigned to you and a list of notifications of activity with documents/files that are associated with you.
- User configurable document hit list screen allows you to drag and drop columns of information that you choose to display for each file.
- Drag and drop uploading of files from Windows Explorer.
- Print to PDF print driver displays pop-up window for assigning your metadata tags for indexing the file at the time of printing.
- Direct integration with the suite of ProSystem *fx* applications:
  - ProSystem *fx* Tax
  - ProSystem *fx* Practice
  - ProSystem *fx* Workstream (SaaS edition only)
  - ProSystem *fx* Portal
  - ProSystem *fx* Engagement (On-premise only)
  - ProSystem *fx* Scan (On-premise only)
  - ProSystem *fx* Scan application provides automated document organization of your 1040 supporting documents in PDF format, including automatic bookmarking. This also includes the PDFlyer utility for annotating your PDF files.
  - Direct integration with Microsoft Office and Outlook
  - Reusable saved searches streamline recurring document searches.
  - Configurable user activity audit trail with reporting tool.

- Tag documents as "confidential" to prevent them from being published to the

integrated portal includes ability to have two-way document discussion threads.

- New features in the on-premise version include:
    - Improved organization and access of files by entity
    - Unlimited document templates with default metadata settings
    - File discussion tool to collaborate with clients and others and store with the file
    - Send files as encrypted e-mail attachments
    - Automation of purging expired files and managing the recycle bin
    - New features in the SaaS version include:
        - Improved entity level search of files
        - Ability to create "private" file groups for selective access
        - File status shape indicators supplement color coding
        - Portal client accounts can now be managed internally by the firm, as well as by the client
        - Option to be prompted for saving outgoing emails directly to Document
        - Improved handling of zip files
        - Tax mapping feature automatically applies metadata to different return types
        - Batch printing of client organizers directly to their portal accounts

Summary and Pricing

CCH has been progressing very nicely in the development of their full suite of true web based SaaS applications. There is no denying that this is the direction the overall market is moving in. The option to deploy Document as either an on-premise or as a SaaS solution gives you the best of both worlds.

Pricing for ProSystem *fx* Document SaaS starts at $730 per user, per year and drops by