CPA
Practice Advisor

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CCH Small Firm Services — PaperlessPLUS
800-375-9542
www.cchsfs.com

From the June 2012 review of Document Storage Systems

Best Firm Fit
PaperlessPLUS is a document storage system that integrates with the ATX and TaxWise tax preparation, Client Accounting Suite and Fixed Asset software from CCH Small Firm Services (SFS). While the system includes certain features only available to current SFS customers, PaperlessPLUS can be used as a stand-alone program for any tax office. The PaperlessPLUS Premier version extends the functionality to include automated source document organization and transfer of data from recognized forms directly to the SFS tax compliance software.

Strengths

- Integration with the TaxWise and ATX suite of tax and accounting applications
- Supports integration with electronic signature pads
- Program Print Driver enables electronic storage of any document, on-screen or printed
- Built-in annotation tools

Potential Limitations

- Only available as an "on-premise" solution with no hosting option available

Features Overview

- Direct integration with ATX & TaxWise accounting, tax compliance and fixed asset

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folders.

- The Premiere version supports integration with electronic signature pads for signing the PDF copy of tax forms online. The signature pad must be purchased separately from their partner Topaz Systems Electronic Signature Capture Pads. There are two models priced $98 and $250.
- The integrated email button provides the opportunity to password protect the file using the taxpayer's last four digits of their tax ID.
- The folder structure can be customized per client as needed.
- Backups can be processed automatically on a pre-scheduled basis.
- A detailed audit trail of document activity history is available.

Summary & Pricing

PaperlessPLUS offers an easy to use document storage solution. Direct integration with the SFS software line provides extra value, yet those not currently using an SFS product can also benefit from the program features. The additional features of the Premier version include integration with the electronic signature pad, OCR document recognition and data extraction and transfer into tax software. At a price of $549 for the base product and $699 for the Premier version PaperlessPLUS is a good value.

Technology

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