4565 characters

800-739-9998

CCHGroup.com

The folks at the CCH division of Wolters Kluwer have been busy working on bringing their Next Generation suite of accounting and tax applications to market, with a focus on a SaaS (Software as a Service) deployment model. This is an appropriate strategy since web-hosted applications delivered through a SaaS model is the biggest transformation in information technology to take place since the move from DOS to Windows.

ProSystem *fx* Document (SaaS) is one of five CCH solutions — along with Tax, Practice, Workstream, and Portal — to be delivered in this platform and has been on the market since October 2009. One of the most important features of this new solution is that it is designed to be scalable for use in a small firm all the way up to a Top 100 firm. That is one of the key value propositions of the SaaS delivery model.

Core Product Features & Functions

The user interface has been designed based on Microsoft standards, which provides for a familiar navigation experience. A navigation panel similar to Outlook appears along the left side of the screen. Here you can choose to search documents by client, staff or office ... or display a list of your designated favorites. A ribbon of functions appears along the top of the window with the option to add files, search documents, generate reports and more. The right-click menu is context sensitive based upon the area of the system in which you're currently working.

The current version does not offer a PDF print driver. However, that feature is

return directly to Document. One of the cornerstones of the Next Generation platform is the ability to share a common client database. Therefore, Document draws from that common database, eliminating redundant client entry and synchronization challenges.

Email integration with Outlook is enhanced with an auto encryption feature that encrypts the document file attachments and sends a separate email with the encryption key to enable the recipient to de-crypt the files.

The new ProSystem *fx* Workstream (SaaS) application is designed to offer a firm-wide engagement workflow solution. It is fully integrated with ProSystem *fx* Practice (SaaS), Tax (SaaS) and Document (SaaS), which enhances your ability to have a truly paperless workflow. 4.75

Remote Capabilities

The system is designed from the ground to be delivered through a web-hosted SaaS model. This product is not currently available as an on-premise solution. For that, you will need to purchase the original program, which is labeled as ProSystem *fx* Document (not reviewed here).

The new ProSystem *fx* Portal (SaaS) solution is fully integrated with Document (SaaS). Documents can be published to the portal with minimal keystrokes and can be posted as view-only or in a collaborative format to allow clients to edit the document. A visual icon on the document hit list identifies documents that are currently posted to the portal. 5

System Management

Document (SaaS) security can be set based on roles, as well as at the document level. A check-out feature controls access to documents currently being edited. Versioning

can be activated to save multiple iterations of a file. Document (SaaS) retention

the small firm by eliminating the costs and challenges of managing an on-premise network infrastructure to support the applications.

Pricing for ProSystem *fx* Document (SaaS) uses a tiered pricing model starting at $650 per user, per year for the first 10 users and declines to $423 per user when you reach 100 users.

2010 Overall Rating 4.75

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.