**CCH, a Wolters Kluwer Business – ProSystem _fx_ Document**
**(800) 739-9998**
**www.CCHGroup.com**

From the May 2013 review of Document Management systems.

**Best Firm Fit**

- Firms who use the ProSystem _fx_ suite of apps, organizations who need the product's capabilities for integrating with information technology systems (active directory) and organizing documents by department or practice area.

- Organizations who want the security and search capabilities of a solution based on Microsoft SQL server

**Strengths**

- Support for multiple departments and multiple offices, as well as on-premises or cloud-based data storage
- Users can route documents, have threaded discussions, and create and respond to review notes from within the application.
- Strong integration with the ProSystem _fx_ suite of applications, including ProSystem _fx_ Portal, all of CCH's cloud-based software as well as the traditional Tax and Engagement applications
- Integrated dashboards and client database allows client information to be changed in one place and made available to other cloud-based apps in the suite

**Potential Limitations**

- Organizations who do not use other items in CCH's cloud-based suite may find

application is built on the latest Microsoft database and server technologies, which provide users with powerful tools for storing, securing, searching, and retrieving large amounts of data. The software also has a user interface which uses the tab-oriented "ribbon" design introduced with Microsoft Office 2007.

In addition to the on-premise version of Document, the cloud-based version of The application is integrated into the rest of the cloud-based suite of CCH applications, which features a common client database. Users who are already using the cloud versions of other ProSystem $fx$ applications will find the integration is seamless; however, those who only use Document may find that the Dashboard may complicate setup. It should also be noted that these Dashboard application is optional, and will be used primarily by administrators.

Integration with other applications in the ProSystem $fx$ suite has been enhanced, including Workstream, Practice, Portal, Knowledge Connect, as well as a new Client Dashboard. A new batch client linking utility has also been released which allows users to automatically print tax returns, working papers, and other documents from the legacy Foundation versions of Tax and Engagement. Users can attach documents to assignments using ProSystem $fx$ Workstream, as well as use ProSystem $fx$ Portal to exchange files securely with clients and third parties.

**Summary & Pricing**

Pricing for ProSystem $fx$ Document SaaS starts at $765 per user, per year and drops by as much as 35% based on volume of user licenses. ProSystem $fx$ Document on-premise solution starts at $2,705 for the server license and $710 per user. Training and implementation services for both versions of the application are priced separately, and depend on the scope of services.

# 2013 Ratings:

| | |
|---|---|
| **Overall Rating** | **4.75** |

Firm Management • 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.