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TECHNOLOGY

CCH Tax and Accounting — ProSystem fx Site Builder

tax.cchgroup.com/pfx/products/sitebuilder

Nov. 29, 2005

From the December 2005 [Review Website Solutions for Accountants](#)

CCH Tax and Accounting's ProSystem *fx* Site Builder initially entered the market in 1997 as Execusite. It was subsequently acquired by CCH in December 2001 and rebranded under its current name a few months later. Over the last several years, CCH has continued to enhance the product by adding Tax Guide content, additional tax calculators and file sharing capabilities. A financial planning toolkit and a business owner's toolkit should also be available by the time this issue goes to press, although they were not available at the time of this review. Sample firm user sites include the following:

www.bellandcompany.net,
www.bigez.com, www.chncpa.com,
www.praetorianadv.com, and www.refjcpas.com.

Design Theme – 5 Stars

The system comes with a base design of seven pages that can be expanded via links to the optional features offered. Several optional design tools are available for an additional fee including a Deluxe Service Package offering that includes a splash page, flash animation and your firm logo on every page (recommended).

Content – 5 Stars

The eContent service provides a comprehensive solution for providing your clients and prospects with tax and financial information automatically. The main module includes an Info Center page with tax calendar and downloadable tax forms, a Newsletter page that provides articles and news links updated monthly, and a Financial Tools page that provides numerous financial calculators. Optional Modules include the following: Life Cycle Events (a series of electronic brochures on various tax and financial events); Financial Planning Toolkit (includes over 1,500 financial planning documents and tools); a Business Owner's Toolkit (includes model business documents, financial spreadsheet templates, checklists and official government forms); and The CCH Tax Guide add-on (provides “easy-to-understand” explanations of various tax issues).

Site Maintenance – 5 Stars

The site is hosted in data centers with a commitment to 99.9 percent connectivity. Template site pages can be edited at any time by the firm, and CCH will provide default text for each page to streamline the setup process. CCH claims that you can create your firm's web site in less than 30 minutes.

Utility Software/Applications – 5 Stars

CCH offers an extended set of applications that can be integrated into the web site, including the following:

- One free e-mail account is provided with the service. Additional accounts can be added for a nominal fee.
- ProSystem *fx* File Share provides the capability for the accountant and client to have shared access to documents and files online.
- ProSystem *fx* Tax Notebook is a tool for clients to enter their tax data online, and the results can be linked directly into the ProSystem *fx* tax preparation software.
- CompleteTax Pro online self-service tax preparation software can be co-branded or private-labeled and serve as an additional revenue source.
- GainsKeeper Pro application manages client portfolios online and tracks activity and reports on gains/losses. It also offers direct integration to ProSystem *fx* Tax to generate the Schedule D.

Site Marketing – 4 Stars

Your domain name is unique and owned by you. The service offers site visit history

tracking for the following period ranges: today, yesterday, this month, last month, current year and prior year.

Vendor Service & Support – 4 Stars

CCH has over 3,100 subscribers currently using the service. The company clearly has the depth of resources to support the service. Web site customization services are available for an additional fee.

Pricing/Value – 5 Stars

ProSystem *fx* Site Builder has a one-time setup fee of \$295, and an \$895 annual recurring subscription fee. This is a reasonable fee relative to the overall service provided. The various add-ons are subject to additional pricing.

Summary

As one of the premier providers of technology solutions for accountants, CCH offers the reputation and depth of resources with which you can feel secure. ProSystem *fx* Site Builder is very much a template-based service. However, it also offers a reasonable level of customization that allows you to portray your firm's identity. The eContent service lets you significantly expand the depth and breadth of the information published on your web site. The user web sites I visited all looked professionally designed.

2005 Overall Rating – 4.5 Stars

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