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ACCOUNTING

CCH's Next Generation ProSystem *fx* Suite Brings Better Way of Working

CCH has introduced a fundamentally new way of working for tax and accounting professionals with the release of its next generation ProSystem *fx* Suite – connecting clients, staff and information on a dynamic, centralized and integrated platform. The new platform was introduced to 1,000 tax and accounting professionals at the CCH User Conference 2009, held October 25-28 at the Gaylord National Convention Center in National Harbor.

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NATIONAL HARBOR, MD. – CCH has introduced a fundamentally new way of working for tax and accounting professionals with the release of its next generation ProSystem *fx* Suite – connecting clients, staff and information on a dynamic, centralized and integrated platform. The new platform was introduced to 1,000 tax and accounting professionals at the CCH User Conference 2009, held October 25-28 at the Gaylord National Convention Center in National Harbor.

“This innovative platform was built from the ground up, with extensive customer input, to support the way people want to work today and the way firms will have to work in the future to remain competitive,” said CCH President Mike Sabbatis.

The first solutions offered as part of the next generation ProSystem *fx* Suite are new versions of CCH's award-winning ProSystem *fx* Tax, Document and Practice, as well as two new applications, ProSystem *fx* Workstream and ProSystem *fx* Portal. To view a demonstration of the new Suite, [click here](#).

The next generation ProSystem *fx* Suite is completely new and built with Microsoft's .NET 3.5 Framework so it is fully scalable, easy to configure and flexible enough to host multiple tenants. It also offers seamless integration across ProSystem *fx* applications, as well as third-party applications. The new Suite will first be available as a Software as a Service (SaaS) deployment. In 2010, the Suite will also be available in an on-premise version.

“We see many advantages to the SaaS model and we are pleased to be the first to deliver these benefits to our customers,” Sabbatis said. “It opens a whole new world of productivity and accessibility – now you can work anytime, anywhere. At the same time, CCH is committed to offering all of our customers the flexibility to work in the way that best suits their needs, whether in SaaS or the way they work today with applications they support on premise. Either way, CCH is delivering performance and productivity enhancements that are unmatched.”

Better Work, Better Life

In reality, the line between work/life has become so blurred that there's often no longer even a slash mark between them. But, there's no doubt that gains in one area can drive improvement in the other. The more you get done at work, the less you take home. The more you can do remotely, the less tied you are to the office.

With the next generation ProSystem *fx* Suite, CCH has delivered new accessibility and productivity advantages professionals have never seen before, and won't find anywhere else.

The foundational innovations the Suite delivers are:

- * Common Client Database,
- * Administration Manager,
- * Individualized Dashboards,
- * Improved User Interface, and
- * Accessibility and Collaboration.

The Common Client Database maintains consistency and improves accuracy and efficiency. With client data stored in a central database, data entered once populates automatically across multiple ProSystem *fx* applications. A change to a name or address or the addition of a dependent only has to be made once to be available in every application that uses the information.

“Professionals are thrilled about the huge productivity gains the Common Client Database will deliver, and the reason is simple. It means people can spend less time keying and more time creating value for clients,” said Sabbatis.

The Administration Manager lets an administrator set up and maintain users, security and firm options across the Suite. The benefits of this centralized administration flow through to individual users, who have a single sign-on to all applications.

Dashboards provide a home page for each user, completely configurable to fit their role in the firm. With the new Dashboard, users can find all the information they need in one convenient place. Dashboards can be configured to show return status, notifications from co-workers with links to returns, panes from certain third-party applications like Microsoft Outlook® and more. Users can keep a project list on their Dashboard and launch a project, such as a tax return, with a single click.

The new User Interface ensures all of the applications in the next generation Suite share the same crisp text and streamlined look. A common look and feel across multiple Suite applications will help users get up to speed more quickly and improve their ease of use. In addition, ribbon-style menus leverage staff’s familiarity with Microsoft Office 2007.

Each of the new solutions will be made available first as a SaaS deployment, hosted by CCH. SaaS solutions are delivered via the Web, which provides the benefit of anytime, anywhere access and collaboration. SaaS also offers a wide range of other benefits – from reducing costs and enabling firms to benefit from the latest technology and features, to shifting the burden of deploying and managing applications away from the firm, so tax and accounting professionals can focus on what they do best – serving client needs.

“SaaS is also an important lever in helping firms attract and retain professionals,” said Sabbatis. “Increasingly, people expect the information and tools they need to do their jobs to be available wherever and whenever they need it.”

Starting Now

Professionals can benefit from these advances starting today. Available now are new versions of ProSystem *fx* Tax, Document and Practice, as well as a new applications, ProSystem *fx* Workstream and ProSystem *fx* Portal.

“As powerful and well-designed as each individual application is, their real power is revealed when they’re deployed together,” Sabbatis said. “Then you see how intuitive work becomes, when the tools and information you need are always there, exactly where and when you need them.”

The next generation ProSystem *fx* Tax is dedicated to saving time – the time it takes a preparer to move a return through the preparation steps, the time it takes to review and communicate with others on your team regarding issues and status and the time it takes to assemble all the forms in the right order, with the right attachments, along with professional, customized correspondence. It’s also dedicated to eliminating wasted time, such as the time it takes to reenter data that already exists in other applications and the time it takes to trace input data and to understand the calculation.

The next generation ProSystem *fx* Document features streamlined and more capable document management. Users can simultaneously import multiple files; or save any document to multiple entities, clients or projects. They can custom-configure e-mail messages by grouping e-mail threads and manage e-mail history to gain a clearer picture of the firm’s correspondence with clients.

With Document, it is now also possible to create ad-hoc file groups without copying files. For example, users can simply select files from multiple applications and multiple years to create a group that will be accessed for processing a tax return.

Next generation ProSystem *fx* Practice integrates with ProSystem *fx* Tax, Document and Workstream to most effectively drive the progress of any given project. Additionally, because next generation ProSystem *fx* Practice is embedded throughout the ProSystem *fx* Suite, firms can update time and billing information and access reports anytime, anywhere.

New options include the ability to set up a review process for employee managers, enter estimated time remaining on projects, enter reasons for overriding a standard rate, or view CPE tracking and historic bank hour entries.

Next generation ProSystem *fx* Workstream is a completely scalable work-tracking application that can be used as a simple, easy-to-use due date tracking system, a full-featured project management system with robust capabilities, or anything in between. It features project templates for ease of setup, saving time while allowing firms to tailor types, masters and projects to fit their needs. Workstream has an easy

to use budget-to-actual system and a look-ahead estimate of hours for completion to trigger notifications. It also allows firms to customize their own route sheets.

With ProSystem *fx* Portal, firms can exchange client documents of any size confidentially and securely. Portal provides quick and secure bi-directional file exchange capabilities, enhancing collaboration and service to clients . Portal is tightly integrated with other solutions in the ProSystem *fx* Suite including ProSystem *fx* Tax, ProSystem *fx* Engagement and ProSystem *fx* Document.

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