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Feb. 17, 2010



Wolters Kluwer

A Central Hub for All Engagements

There's a reason CCH ProSystem *fx* Engagement is the #1 solution of its kind — it's versatile enough for any firm. Whether you do business tax returns, audits or both, Engagement can help your firm improve engagement efficiency by as much as 40%. Combining three tools in one solution, CCH ProSystem *fx* Engagement will serve as the central hub for all your engagements!

1. **Workpaper Manager:** *Organize and store any electronic document in binders, importing and exporting [directly from Microsoft® Office applications](#)*
2. **Trial Balance Manager:** *Flow data from the trial balance, automating financial statements and tax returns*
3. **Workflow Tool:** *Manage the progress of engagements from creation to sign-off*

Paperless Engagement Management

Put the power of paperless in your hands. Access your files from anywhere with an internet connection and streamline every step from setup to sign off and finalization.

Then rollover only what you need with flexible roll-forward features for even greater

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Automate the Trial Balance

The trial balance functionality is where CCH ProSystem *fx* Engagement shines, and where firms see the biggest gains in efficiency. By automating the dissemination of data from the trial balance to workpapers, you ensure data is correct throughout the engagement, even if changes are made to the trial balance after workpapers are generated.

- **Automatically flow data from the trial balance** to workpapers — automate lead schedules, reports, worksheets, financial statements, **even tax returns**
- **Links from workpapers back to the trial balance** allow you to trace back to the data source with just a click (great for partner or peer review!)
- **A 'Trial Balance Snapshot'** makes it easy to identify ungrouped accounts, out of balance journal entries and other important information at a glance

Increase Productivity

CCH ProSystem *fx* Engagement is truly an end-to-end workflow tool, allowing you to monitor and control the progress of any engagement from start to finish, whether audit or tax.

- **Improve collaboration with team members** by allowing multiple staff to work on an engagement at once, and offering tools that make it easy to add and address review comments
- **Electronically manage sign off, finalization and binder lock-down** to stay in compliance with reporting rules
- **Seamless integration with tax and audit workflow tools**, including the industry's only *truly* integrated audit process with Wolters Kluwer's Integrated Audit Approach, of which Engagement is the foundation

[Learn More Online.](#)

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