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CCH, a Wolters Kluwer business – ProSystem fx Portal

2012 OVERALL RATING ★★★★★



800-739-9998

www.cchgroup.com/portal

2012 Overall Rating 4.75

Best Fit

Firms wanting secure client file sharing functions with integration into other CCH programs, along with file versioning and automated retention and expiration capabilities.

Strengths

- Can be used on all major browsers and platforms

- Strong security customization

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Summary & Pricing

For firms using ProSystem *fx* for tax compliance, document management and other functions, ProSystem *fx Portal* should be a definite addition. It provides excellent integration and enhanced functionality with those programs. For other firms, it can also work as a stand-alone client portal utility, offering strong customization and user access privileges, along with file versioning and configurable automated document retention and expiration functions. Pricing is based on tiered annual subscription packages starting at \$950 annually.

Firm User Experience 5

Client-Side Interface 4.75

Portal Capabilities 5

Technical Aspects 4.5

Help/Support 4.5

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