

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

800-PFX-9998

CCHGroup.com

Best Fit

Accounting professionals who need the ability to create, update, and manage up to 2,500 or more client portals in a powerful client interface. The Enterprise version supports unlimited portals. Firms who use the CCH ProSystem *fx* suite of applications (but not necessarily those who use CCH Small Firm Services). Firms who want to publish invoices, tax returns, and documents to portals from within other applications.

Strengths

- Easy to use interface with customizable firm branding which supports drag and drop into most web browsers.
- Good integrations with ProSystem *fx* Tax, ProSystem *fx* Document, Global *fx* Tax, and ProSystem *fx* Engagement.
- Customizable client-facing materials for explaining how to use the portal and automated password reset e-mails for clients.
- Files can be archived and removed either by settings for an entire folder or using individual settings for each file.

Potential Limitations

- ProSystem *fx* Portal offers good integration with most software in the CCH suite, including ProSystem *fx* Document SaaS and ProSystem *fx* Engagement, however, there is not any special integration with the CCH Small Firm Services applications (ATX, TaxWise, etc.) or the on-premises Foundation version of ProSystem *fx* Document.

- The service does not encrypt data at rest on its servers, which may be required by

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

can be uploaded individually or using a drag and drop interface into a Silverlight-enabled browser.

Users can be notified via e-mail or via alerts when a file is uploaded or downloaded, and the system tracks files which are near their expiration date and have not been accessed by a client. Notification e-mail templates are customizable, and can be modified to include firm-specific language and branding as well as system-tracked data like file expiration dates.

The product includes a keyword search function which allows users to search for a user's portal by e-mail address as well as search for words within the files in the shared area.

The integration with some of the CCH applications is impressive, and includes the following:

- ProSystem fx Practice (SaaS) users can print client invoices directly to client portals.
- A batch client linking tool allows users of ProSystem fx Tax, Global fx Tax, and ProSystem fx Engagement to quickly link engagements in these products to client portals. Once linked, tax returns and working papers can be published directly to a portal.
- Portal users who have ProSystem fx Document (SaaS and on-premise versions) can see if a portal has been created for a client without leaving the Client Manager.
- Files stored in ProSystem fx Portal can be copied to and from ProSystem fx Engagement with a few mouse clicks.
- Users who use ProSystem fx Document along with Portal can run a large number of reports on portal settings and activity.

Portal offers an intuitive interface, with clients listed in a pane alongside an explorer

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Summary & Pricing

ProSystem *fx* Portal is a good fit for many firms, especially those running the ProSystem *fx* suite of applications. Plans start at \$630 per year (\$52.50/mo).

Firm Management

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.

© 2024 Firmworks, LLC. All rights reserved