



The CCH Open Integration Platform

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CCH Open Integration Platform

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CCH Open Integration Platform

- New way of working; delivering big efficiency gains
- Enables integration of applications from different sources, sharing common data and streamlining workflows easily between systems
- Applications available for integration include those from CCH, applications by third party providers - and even applications developed within a firm or corporation
- Platform enables seamless, secure integration between CCH common data, rich features sets and services, and third party solutions

CCH Open Integration Platform

- Supported by next generation of CCH cloud-based solutions
- Utilizing service oriented architecture (SOA), CCH's SaaS solutions and the Open Integration Platform and deliver truly differentiated cloud capabilities, anywhere and anytime
- Built to support a firm's entire "ecosystem"
- Built to support the open and collaborative way people want to work today

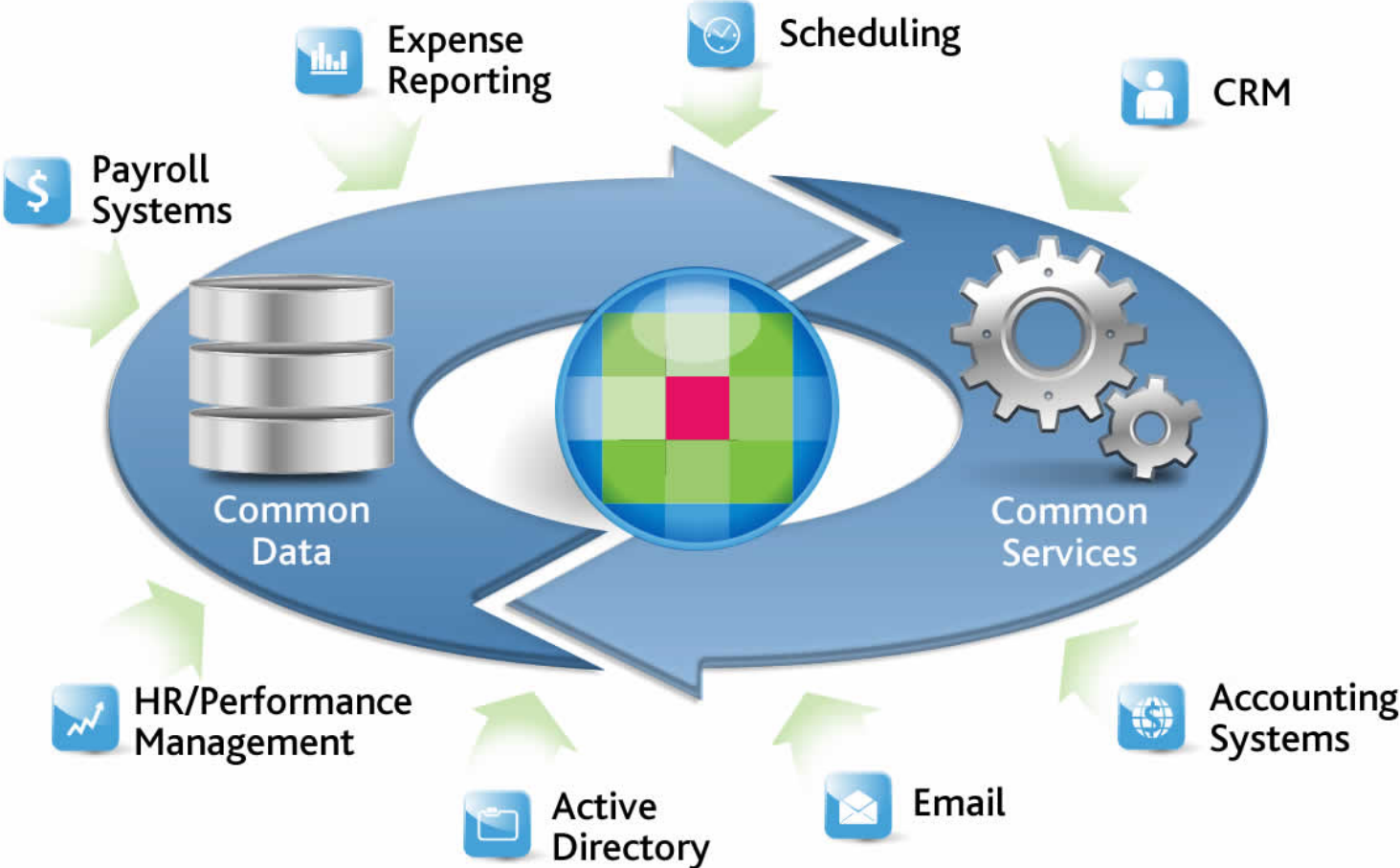
CCH Open Integration Platform

Approach

Provide open architecture platform to accelerate third party product integration

- Leverage Product Suite Integration (PSI) framework by exposing suite APIs' in distinct Open Integration Kits (OIKs) licensed to 3rd party providers, as well as customers
- Implement both client side and server side functionality where needed
- Maintain high level of security
- Deliver stream of functionality prioritize based on demand

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CCH Open Integration Platform and ProSystem *fx* SaaS



ProSystem *fx* SaaS

- Common
 - Common Data Integration
 - Client Inquiry
 - Staff Inquiry

- Practice
 - Access Clocks for Timekeeping
 - Key Time

- Workstream
 - Create/Update Projects for research

- Document/Portal
 - Print/Save to Document
 - Print/Save to Portal

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Benefit to Customers

- Creates competitive advantage
- Increases efficiency
- Reduces errors through extension of 'common data' outside of the ProSystem *fx* Suite (update client/staff info once, have it pushed to other apps)
- Increased productivity through automation of processes (link to Workstream from third party apps like Write-Up, print directly to Document)
- Increased billables though integration with clocks and time entry
- Supports collaborative, open way of working:
 - Freedom of choice *and* benefits of point in time integration
- Increases the value and ROI of CCH ProSystem *fx* SaaS Suite solutions

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Benefit to Partners: Platform Partners Program

- Range of software licenses, plus range of tools and technical training opportunities to get integrations developed and tested
- Advanced previews of CCH roadmaps and technology strategy
- Access to Tools and Resources
 - CCH Open Integration Kits (similar to Software Development Kits) tools, provide sample code, and maintain resources needed to successfully develop and test applications for CCH product lines
 - Training & Consulting Services Support
 - Tutorial
- New business model opens new revenue stream

Open Integration Platform Partners

- Now working with several third party partners to build initial integrations, including:
 - Templeton Solutions (CRM)
 - New River – Beyond415 (IRS Notice Management)
 - AccountantsWorld (Accounting)
 - XCM (Workflow Management)
- XCM used Open Integration Kit to develop integration to ProSystem *fx* Document SaaS and On Premise
- XCM™ Workflow Management Software clients now can create links from XCM tasks to files stored in Document and access those files on demand
 - They can access and edit these files directly from the XCM routing sheet without leaving the third party application – providing a more seamless, uninterrupted workflow



Thank you

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