

## ProSystem *fx* Suite: The Next Generation

### Key features of the next generation ProSystem *fx* Suite:

#### — Centralized Management and Information

- Common client database
  - One database that stores client information for ProSystem *fx* applications
  - Streamlines and simplifies updates to client information, improves efficiency and reduces errors

#### — Portability & Collaboration

- True portability via SaaS platform: Work anywhere, anytime
- SmartClient technology
  - Richer user interfaces, more powerful performance, and faster load times
- Improved ease of implementation
  - Easy deployment/installs, easy updates

#### — Administration Manager

- Central location to set up and maintain users, security, preferences, etc. across the ProSystem *fx* Suite; single sign-on

#### — Workflow & Process Improvements

- Advanced workflow and project tracking
  - Workflow encompasses all ProSystem *fx* Suite products; fully customizable to meet firms' specific needs
- Customizable dashboards
  - Create and customize dashboards to meet user needs

#### — Improved User Interfaces

- Common look and feel across the ProSystem *fx* Suite, improving ease of use

#### — Enhanced Integration

- Open architecture and standard data exchange will allow enhanced and simplified integration, across the Suite and third-party applications

## FAQs

### 1. What is the next generation of the ProSystem *fx* Suite?

The next generation of the ProSystem *fx* Suite is a set of robust products and services, developed with extensive customer feedback, that is being delivered on a dynamic, centralized, Software as a Service (SaaS) platform to help customers connect to their clients, staff and information to work more productively and efficiently.

### 2. How is the new ProSystem *fx* Suite different from the existing platform?

The new ProSystem *fx* Suite platform is completely new, built with Microsoft's .NET 3.5 Framework from the ground up. The first wave of the enhanced Suite is being made available first as a SaaS deployment. CCH is also continuously developing new features and enhancements for the on-premise, client server or network version of the Suite, giving customers the functionality needed to get the job done, on whatever platform they prefer. On-premise versions of Suite solutions will be delivered in 2010.

### 3. What is being delivered as part of the next generation ProSystem *fx* Suite?

The next generation of the ProSystem *fx* Suite is being launched in stages. Now launching are next generation versions of ProSystem *fx* Tax, Practice and Document in addition to two new products, ProSystem *fx* Portal and Workstream. Releases of other ProSystem *fx* products will follow in 2010, including on-premise versions of Tax, Document, Practice and Workstream.

### 4. What does SaaS have to do with the next generation of the ProSystem *fx* Suite?

The Suite is being delivered leveraging SaaS, which means the products are hosted by a third party and accessed through the Internet. There are many productivity, efficiency, flexibility and cost benefits to the SaaS model for customers.

### 5. What is SaaS and what are the benefits to customers?

SaaS is a software deployment model in which an enterprise application is delivered and managed as a service by the vendor to meet the needs of multiple customers simultaneously. SaaS solutions are delivered via the Web, which provides the additional benefit of anytime/anywhere access. The next generation of the ProSystem *fx* Suite features SaaS versions of CCH ProSystem *fx* products, in addition to new on-premise versions in 2010. Specific benefits of SaaS are:

- Shifts the burden of keeping an enterprise application up and running from firms to CCH.
- Lets users leverage CCH software functionality without the burden of deploying and managing the software themselves.
- Eliminates the added costs and complexities of deploying additional hardware and software.
- Provides automatic updates and enables firms to benefit from CCH's latest technological features without the disruptions and costs associated with software updates and upgrades.

## Tax

### 6. What are the key features and benefits of the next generation of ProSystem *fx* Tax?

Key features and benefits of ProSystem *fx* Tax SaaS include:

- **Simplify on-screen review.** On-screen reviews will be more efficient.
- **Create customized views.** Users can customize the information they want to see about returns with enhanced Return Manager functionality.
- **Improve client communications.** Build professional correspondence from templates and edit in Microsoft® Word. Users have complete control over client correspondence.
- **Save time when printing returns.** Create print sets, send to multiple destinations by copy type, insert objects and add watermarks.

## Document

### 7. What are the key features and benefits of the next generation of ProSystem fx Document?

Key features and benefits of ProSystem fx Document SaaS include:

- **Streamlined document management.** E-mail URLs that directly link to a file saved within Document; simultaneously import multiple files; or save any document to multiple entities, clients or projects.
- **Find documents more easily.** Find documents and files using intuitive search functionality similar to Microsoft® Outlook.
- **Manage e-mail messages.** Users can group e-mail threads and manage e-mail history to gain a clearer picture of their firm's correspondence with clients.

## Practice

### 8. Which Practice product was rewritten? What are the key features and benefits of the next generation of ProSystem fx Practice?

The best features of both products, as well as new features and enhancements, were brought together into the ProSystem fx Practice product developed on the new platform.

Key features and benefits include:

- **View all Practice data in one place.** Configure various views in the centralized ProSystem fx Suite dashboard to view important practice information, such as client billing and A/R notes, notifications of bills ready for review, employee productivity graphs, and other employee statistics.
- **Easily manage time entry.** New options include the ability to set up a review process for employee managers, enter estimated time remaining on projects, use a designated input field for work location that captures information for sales tax reporting, enter reasons for overriding a standard rate, or view CPE tracking and historic bank hour entries.
- **Simplify billing and invoicing.** Bill groups of clients, post multiple invoices for one client, and more. Creating and applying progress bills are much more robust, allowing these bills to go across engagements and projects.
- **Streamline set-up processes.** In setting up client and employee information, the design leverages template set-up to make adding clients and employees a snap. CCH has included more customization so that firms can determine the structure of client managers as well as their own preferences for the manager labels.

## Portal

### 9. How will ProSystem fx Portal be different than what is currently available?

The current ProSystem fx Document Client Portal solution is only available as an add-on module for Document. The new Portal still has tight integration with Document, but can also be purchased and used as a standalone application. Here's a look at the functionality of the Portal: Bi-directional upload/download; Automated password reset; Post to multiple portals at one time; E-mail notification when a document is posted; Ability for firms to manage licensing for their clients to give temporary access to a bank or other entity; One login gives access to all portals the login has been granted permission to view collaboration area.

## Workstream

### 10. What is ProSystem fx Workstream?

Workstream is a new ProSystem fx product that combines the functionality of workflow and project management systems to help users manage work projects with deadlines. Project set-up has been designed to be entirely scalable for any size firm. Global decisions can be made to define the complexity of each type of project based on master templates that fit the standard processes and procedures of the user's firm. Workstream can be used by itself, but the power of Workstream is realized when combined with other products. With access to project information from all areas of the Suite, staff can reach out for information about their projects to record and update project information without interrupting their work or leaving the application in which they are currently working. Workstream also has the ability to automate processes, including notifying key contributors about the health of a project.