

For tax and accounting professionals,

It's a whole new world.

The next generation of

ProSystem *fx*[®]

Where you can work faster and your day is easier.

Where you and your clients get connected.

Where technology sets you free.

So that you and your firm move forward.

Work faster. Work smarter. Work together. Work anywhere.

Why enter data five times when you can enter it once? Why wonder how close your project is to completion? Why be tied to your desk when you can handle the job at home?

Your needs were our starting point in developing the next generation of ProSystem *fx*. We started with the power you know and count on. Then we advanced its user interface and productivity features light-years ahead, so you can get your work done better, easier and faster.

All the modules in the next generation of ProSystem *fx* work together, for a shorter learning curve and seamless workflow. You can integrate third-party applications at will. Remotely deploy a software improvement online to every staff member, with only a few keystrokes. And because the next generation of ProSystem *fx* is built on an open, Internet-delivered architecture, you can work from anywhere...anytime.

Built around you

When we developed the next generation of ProSystem *fx*, we challenged ourselves to an ambitious goal: not just a superior suite of products, but a fundamentally new and better way of working.

To get there, we talked...and listened. We conducted hundreds of interviews and studies with users like you. Then we designed around those insights, from the smallest details of the user interface to the very roots of our software architecture.

When you use the next generation of ProSystem *fx*, this mission shines through in every touchpoint and every feature. By watching the way actual accountants and tax preparers use our applications in a modern workflow, then utilizing the latest advances in technology, CCH has now delivered built-in productivity and flexibility advantages you've never seen before—and won't find anywhere else.

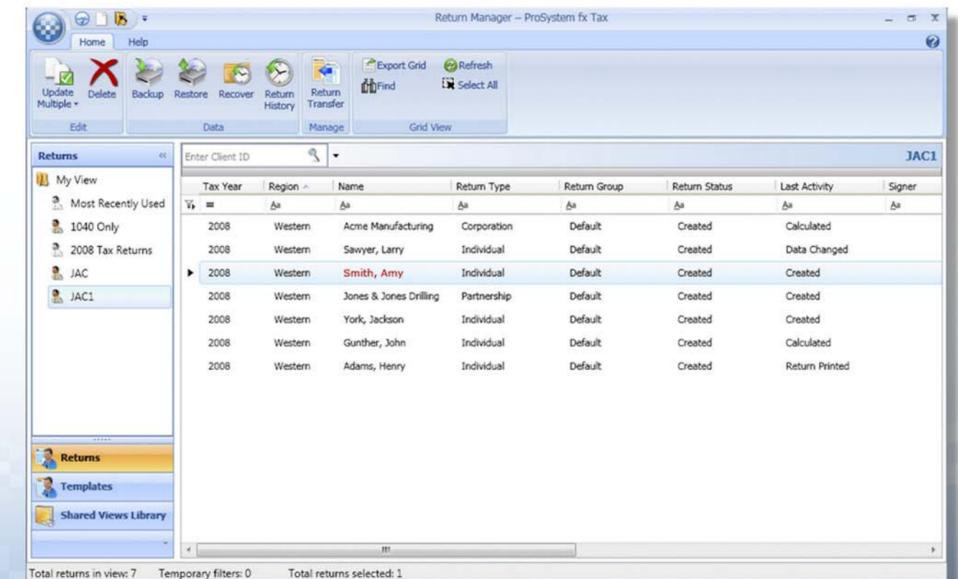
You shouldn't be limited by your software. Now there's software that casts aside the old ideas of what's possible, so you can do the same. Welcome to the next generation of ProSystem *fx*. The industry standard in tax and accounting software has now become even more intuitive and efficient than before—setting you free to pursue a higher level of success.



Work faster. Work smarter.
Work together. Work anywhere.



Start your day at the Dashboard. At a glance you'll see the day's work, IM-style notes—even your Outlook® calendar and email inbox—then jump seamlessly to any ProSystem fx application.



One more benefit of our integrated approach: set up your preferences, security and authorized users just once, and they're set in multiple ProSystem fx applications. For example, the Return Manager (above) lets you customize how you view your returns.

A new world of ease

All your applications, working together.

The next generation of ProSystem fx is built on the strength of a common client database, shared by all its applications. Log in just once and you can access data from multiple ProSystem fx applications. Once under way, streamlined new dashboards let you control ProSystem fx and third-party applications from one screen.

Less keying, more collaboration.

Now it's easy, thanks to the shared database that stores client information across multiple ProSystem fx applications. Enter data once and it populates everywhere else it needs to be. Work on two projects at the same time, yet never lose track of the latest version of documents and forms.

It's smarter—and looks it.

Greater productivity can be a pleasure. All applications in the next generation of ProSystem fx share the same crisp text and streamlined look of today's modern office suites. This clean interface not only makes ProSystem fx more enjoyable to use, it also lets you tap the full measure of its enhanced power and performance.

A new world of efficiency

All the data, all in one place.

The next generation of ProSystem fx lets you manage your most vital client, firm and staff data in one place. And when you update client information, you only do it once—not once per application—so you work faster and with less chance of error.

Lower costs, quicker updates.

ProSystem fx Software as a Service (SaaS) applications are provided online from a central server, so your firm doesn't need to invest in additional hardware or IT resources. Cloud computing helps you save money up front and save on maintenance later. Updates and enhancements are delivered faster. And as your business needs change, the next generation of ProSystem fx can scale up more easily to meet them—so you enjoy best-in-class performance for years to come.

Simpler administration, better reporting.

You can set up and maintain users, security and preferences across multiple ProSystem fx applications, thanks to its centralized administration. And with its comprehensive reporting capabilities, you can generate reports across multiple ProSystem fx products.

Better life, better work, better talent.

The next generation of ProSystem fx is accessible to you anywhere and anytime. Which means you can work from home. Combine staff from different offices on the same project. Collaborate securely with your clients online. Even attract talent you couldn't before, by offering lifestyle options your new software can support.



Meet the next generation

Get acquainted with the first wave of products in the next generation of ProSystem fx. Each of these five applications is designed to work seamlessly with each other, with subsequent ProSystem fx applications, with your own third-party applications...and with you.



ProSystem fx
Tax

See all your data, centralized in one place.

ProSystem fx Tax, the tax compliance and preparation software that's trusted by leading CPA firms of all sizes, is now engineered to become a seamless part of your firm's workflow for maximum productivity and convenience.

- Lets you create customized views of the information you want to see about returns, so it's transparent to the way you work.
- Simplifies your on-screen reviews, through helpful features like tickmarks and diagnostic sign-offs.
- Requires less data entry, saving you tedious steps and precious time.
- Saves you time when you print returns—you can create print sets, send to multiple destinations, insert objects and add watermarks.
- Helps you communicate better with your clients, with templates that let you create and edit professional correspondence in Microsoft® Word.



ProSystem fx Document

Take charge of your firm's documents.

Today's paperless office has one thing in common with the old paper-intensive one: It only works if you know where your documents are. The next generation of ProSystem fx Document answers that need, with tools that let you store, find and use all documents and emails for both your firm and your clients.

- Protects you by securing your documents, ensuring regulatory compliance and avoiding needless liability exposure.
- Groups your emails by thread and manages your email history, giving you a clearer picture of your correspondence with clients.
- Makes document searches easy, thanks to an intuitive search interface that's similar to Microsoft® Outlook.
- Lets you import multiple files at once or save any document to multiple entities, clients or projects.
- Allows you to customize the application to work exactly as you choose, and remembers your choices each time you log in.
- Provided online, like all next-generation ProSystem fx applications, to give your firm the advantages of server-based cloud computing. However, versions that run on the firm's premises will also follow for those who need them.



ProSystem fx Practice

Turn time entry, billing and invoicing into a center of efficiency.

Many firms see time entry as an ordeal, but it can also be an opportunity. By centralizing this key operational function, the next generation of ProSystem fx Practice helps you manage your firm more easily, gain insight into its activity and improve its productivity.

- Makes time entry easier to manage, with flexible new options that let you enter the estimated time remaining on projects, enter the reasons for overriding a standard rate, or view CPE tracking and historic bank hour entries.
- Provides multiple methods for your staff to keep track of their time by daily entry, weekly entry or by use of clocks.
- Provides up-to-date calendars with productivity and billing statistics, helping employees to manage themselves.
- Sends your staff auto-reminders to record their hours so they're credited for all their hard work.
- Simplifies billing and invoicing—you can post multiple invoices for one client, bill groups of clients and more.
- Provides a centralized dashboard where your staff can use their Microsoft Outlook calendars, email and to-do lists, as well as view and enter time.



ProSystem fx Portal

Collaborate with clients and exchange files with confidence.

It's already illegal in several states to send email attachments without sufficient protection, and more are expected to follow. In addition, almost all states require full disclosure if a security breach occurs. To mitigate your risk and protect your confidential client data, trust the full-featured solution from the tax and accounting software leader: the next generation of ProSystem fx Portal.

- Saves you the time and money it costs to physically exchange paper documents or DVDs, either to or from your clients.
- Offers you a secure digital point of access to safely store and exchange files, saving you the implementation costs of a complicated data encryption scheme.
- Lets you or your clients upload electronic documents and files to your portal, immediately and securely.
- Allows document transfer between you and your clients in both directions, from anywhere there's an Internet connection.
- Lets each user access all the portals they're authorized to use, by logging in just once.
- Gives you the flexibility to control access levels, set expiration times for posts, automatically notify recipients, set up a folder structure that mirrors your firm's and more.
- Works as a stand-alone application or in tandem with next-generation ProSystem fx Document to give you even broader capabilities.



ProSystem fx Workstream

Take control of your workflow—and your profits.

ProSystem fx Workstream streamlines your workflow as never before, by giving you a real-time view on the status of every project in your firm. Now you can tailor each project to the level of complexity that suits the job, and you gain immediate productivity increases that translate into more billable hours.

- Keeps you up to date on every piece of work you need to do, are doing or have done.
- Tracks all due dates and budgets hours more accurately, to make sure each project is getting done on time and on budget.
- Automatically logs your employees' time in the time sheet at each project stage.
- Provides budget-to-actual reporting, helping you keep project costs in bounds.
- Automatically notifies you—or any group within the firm—of the next milestone on your project.

The next generation will continue to grow—watch for more new ProSystem fx products in the months to come.



The big benefits

For you...

- Work from anywhere, anytime.
- Log in just once to access multiple programs.
- Enter data just once to populate multiple programs.
- Access all programs from on-screen dashboards.
- Work in a streamlined, modern interface.
- Collaborate securely with colleagues and clients.

For your organization...

- Gain the efficiency of centralized administration.
- Integrate remote offices into your workflow.
- Track the progress of each project.
- Recruit a broader pool of talent.
- Ensure that your firm always has up-to-date software tools.

Questions? Give us a call at
1-800-PFX-9998 (1-800-739-9998)